



1. The name of your Trust (i.e. The Smith Family Trust, up to 100 characters)

2. Person(s) who should inherit the estate (heirs) after you are deceased:

3. Person(s) who should inherit the estate if all of the above named individuals are deceased (you and the heirs). You may name charities as well as individuals :

4. Postponement of possession-for young or financially unsophisticated heirs:

a. Control of inheritances after age _____

b. Monthly income of \$ _____ until age _____ then distribute in full at age _____

c. Give control of inheritances in 3 segments:(choose one)

i. 1/3 at age _____ then age _____ and finally age _____

ii. 1/4 at age _____ then age _____ then age _____ and finally age _____

iii. 1/2 at age _____ and finally age _____

iv. Distribute in ten annual installments beginning at age _____



5. Name of Successor Trustee(s) if neither spouse can serve (two persons may serve in the same capacity) :

First Priority _____

Second Priority _____

Third Priority _____

6. Person(s) to make health care decisions if you are no longer mentally competent

Husband _____ Wife _____
First Choice

Second Choice _____

Third Choice _____

7. Guardian(s) of minor children (two persons may serve together for each choice) :

1st Choice _____

2nd Choice _____

3rd Choice _____