



826 BrooksideAve., Suite C • Redlands • California • 92373 • (909) 335-0155

LIVING TRUST WORKSHEET

(If you are doing a joint trust, don't forget that you must each do your own individual will)

Enter your name exactly how you want it to appear on your Trust:

If you are doing a joint trust i.e.: The Robert L. and Maria Garcia Living Trust. Be sure to include both names. You can also put it as: The Garcia Family Living Trust.

D.O.B. _____ / _____ SS # _____ / _____

Address _____

Phone # Home _____ Cell _____ Other _____

Name one or more persons or organizations that will take over as your Successor Trustee in case of incapacity or death.

Successor Trustee Name _____

Address _____ Phone # _____

Alternate Successor Trustee _____

Address _____ Phone # _____

Property to be put in the trust. Please include the description, APN #, Account #, Make/Model/Year, Address etc.

1. _____

Does it have a title YES NO

2. _____

Does it have a title YES NO

3. _____

Does it have a title YES NO

4. _____

Does it have a title YES NO

5. _____

Does it have a title YES NO

6. _____

Beneficiaries of the trust

Name _____
Address _____ Phone # _____
Property to be given _____

Name _____
Address _____ Phone # _____
Property to be given _____

Name _____
Address _____ Phone # _____
Property to be given _____

Name _____
Address _____ Phone # _____
Property to be given _____

Name _____
Address _____ Phone # _____
Property to be given _____

Residuary Beneficiaries (who will get the rest of your estate that you have not specifically listed above)

Name _____
Address _____ Phone # _____
Property to be given _____

Name _____
Address _____ Phone # _____
Property to be given _____

Name _____
Address _____ Phone # _____

ACKNOWLEDGMENT AND AUTHORIZATION

I understand that the Legal Document Assistant (LDA) preparing my documents in NOT an attorney, cannot select forms and DOES NOT give legal advice. I hereby direct the Legal Documents Assistant to type and perform certain services as outlined in our discussion(s). I further declare that the foregoing information which I have provided is, to the best of my knowledge, true and correct.

Dated: _____

Signature

Dated: _____

Signature