

Strategic Tax Planning, LLC

Tax Consulting · Tax Preparation · Trust Services · Asset Protection

TRUST QUESTIONNAIRE FORM REVOCABLE LIVING TRUST (Married Couple)

NOTE: If trust is being re-stated you must use **ORIGINAL** trust name, date and client names as they appear in original document.

1. What name would you like your trust to have? We recommend "THE (YOUR LAST NAME) FAMILY TRUST"; you may choose any name:

2. Husband's name (First, Middle or Middle Initial and Last; use Sr. or Jr. when appropriate):

3. Wife's name (First, Middle or Middle Initial and Last):

4. Address:

Street Address

City

State

Zip

County

5. Phone (Days): _____
- (Evenings): _____

Will the Trust Documents be signed in the above County and State?

Yes _____ or No _____

Client Signature of approval: _____

NOTE: Employees of Strategic Tax Planning LLC are not lawyers, are not employed by a lawyer, cannot give legal advice, and communications with us are not privileged.

Providing Financial Solutions

8801 W. Union Hills Drive, Building C, Peoria, Arizona 85382
Phone (623) 875-5266 · WMI Toll Free 1-888-91-ASSET · Fax (623) 875-3681
www.wealthadvantage4u.com

6. How much control do you want the surviving spouse to have over the trust: (3 options; choose one)

Option 1: (Maximum Control)

_____ Maximum control consistent with creditor protection and tax avoidance provided by trust. (Includes the right to re-name the final trust beneficiaries). *This option gives the surviving spouse the authority to re-write the trust as to how it will be disposed of upon his/her death; it is the same as a joint tenancy title.*

Option 2: (Medium Control)

_____ All income; use of principal to maintain standard of living; little or no accountability to final heirs. *This option gives the surviving spouse a great deal of control as to how assets are managed and spent during his/her lifetime; however, the deceased spouse's assets must go to his/her heirs when the surviving spouse dies; the surviving spouse may change the percentage among the heirs, excluding any one or more.*

Option 3: (Limited Control)

_____ All income; use of principal to maintain standard of living; accountability to final heirs. *This option gives the surviving spouse a great deal of control as to how assets are managed and spent during his/her lifetime; however, the surviving spouse is legally accountable to the final heirs for following the terms of the trust.*

7. Persons who should inherit assets after both spouses are deceased:

You may divide heirs into two groups (Group a or Group b). Example: 50% to husband's children - Group a - and 50% to wife's children - Group b.

Name	Relationship*	If Heir Doesn't Survive	%	Group
_____	_____	1 2 3 4 5	____	a b
_____	_____	1 2 3 4 5	____	a b
_____	_____	1 2 3 4 5	____	a b
_____	_____	1 2 3 4 5	____	a b
_____	_____	1 2 3 4 5	____	a b

Providing Financial Solutions

8801 W. Union Hills Drive, Building C, Peoria, Arizona 85382
 Phone (623) 875-5266 · WMI Toll Free 1-888-91-ASSET · Fax (623) 875-3681
www.wealthadvantage4u.com

_____	_____	1 2 3 4 5	_____	a b
_____	_____	1 2 3 4 5	_____	a b
_____	_____	1 2 3 4 5	_____	a b

(Must total 100%)

*Relationship: if heir is a son or daughter select:
H = husband's child, W = wife's child, J = joint child

- 1 = if heir doesn't survive, to his/her own descendants (children, grandchildren, etc), if any, otherwise pro rata to other beneficiaries.
- 2 = if heir doesn't survive, to his/her spouse, if any, otherwise pro rata to other beneficiaries.
- 3 = if heir doesn't survive, to his or her descendants (children, grandchildren, etc.), if any, otherwise to his or her spouse, if any, otherwise pro rata to other beneficiaries.
- 4 = if heir doesn't survive, to his or her spouse, if any, otherwise to his or her descendants (children, grandchildren, etc.), if any, otherwise pro rata to other beneficiaries.
- 5 = if heir doesn't survive, pro rata to other beneficiaries and NOT to the heir's spouse or descendants (children, grandchildren, etc.).

8. Person(s) who should inherit the estate if **ALL INDIVIDUALS** in no. 7 above are deceased: (Only list person(s) who will not inherit under question 7)

Name	Relationship*	If Heir Doesn't Survive	%	Group
_____	_____	1 2 3 4 5	_____	a b
_____	_____	1 2 3 4 5	_____	a b
_____	_____	1 2 3 4 5	_____	a b
_____	_____	1 2 3 4 5	_____	a b
_____	_____	1 2 3 4 5	_____	a b
_____	_____	1 2 3 4 5	_____	a b
_____	_____	1 2 3 4 5	_____	a b
_____	_____	1 2 3 4 5	_____	a b

Note: Charities that are listed in question #7 must be listed here also if you intend for them to inherit in the event the individuals in question #7 are all deceased.

Providing Financial Solutions

8801 W. Union Hills Drive, Building C, Peoria, Arizona 85382
Phone (623) 875-5266 · WMI Toll Free 1-888-91-ASSET · Fax (623) 875-3681
www.wealthadvantage4u.com

9. Is any family member intentionally excluded?

Name(s) and Relationship:

10. Postponement of possession - for young or financially unsophisticated heirs.

NOTE: Funds will be available before distribution age(s) for education, health care, support and maintenance.

(Four (4) options; choose one and fill-in age(s))

Option 1: Default Option

_____ Give control of inheritances after age _____ (default = 25).

Option 2:

_____ Supplemental monthly income of \$ _____ (default = \$1,000) until age _____ then distribute in full (Default = 50; minimum = 40).

Option 3:

_____ Give control of inheritances in stages:(Four options; Choose one)

Option a: (Default = 25, 30, 35, 40)
1/10 of total inheritance at age _____
2/10 more at age _____
3/10 more at age _____
4/10 (balance) at age _____

Option b: (Default = 25, 30, 35)
1/3 at age _____
1/3 at age _____
1/3 at age _____

Option c: (Default = 25, 30, 35, 40)
1/4 at age _____
1/4 at age _____
1/4 at age _____
1/4 at age _____

Providing Financial Solutions

8801 W. Union Hills Drive, Building C, Peoria, Arizona 85382
Phone (623) 875-5266 · WMI Toll Free 1-888-91-ASSET · Fax (623) 875-3681
www.wealthadvantage4u.com

Option d: (Default = 25, 30)
1/2 at age _____
1/2 at age _____

Option 4: (Default = 25)

_____ Distribute in ten annual installments beginning at age _____.

11. Who should serve as successor trustee, if **neither** spouse can serve?

First Choice: _____

Second Choice: _____

Third Choice: _____

NOTE: You may list more than one person in the same order of priority to serve as co-trustees; if one can't serve, the other(s) will serve.

12. Who should direct investments, if other than successor trustee? (This is a **non-binding recommendation for the Trustee**).

13. Who should make your **health care** decisions if **neither** of you are mentally competent?

(Spouse is automatically first choice; do not enter spouse's name)

Husband:

Wife:

First Choice: _____

Second Choice: _____

Third Choice: _____

NOTE: You may list more than one person in any order of priority.

14. Who should act as Guardian of any minor child(ren)?

First Choice: _____

Second Choice: _____

Third Choice: _____

NOTE: You may list more than one person in any order of priority.

Providing Financial Solutions

8801 W. Union Hills Drive, Building C, Peoria, Arizona 85382
Phone (623) 875-5266 · WMI Toll Free 1-888-91-ASSET · Fax (623) 875-3681
www.wealthadvantage4u.com

15. Do you want a living will?

Husband: Yes _____ No _____

Wife: Yes _____ No _____

NOTE: The following two options only apply if you checked "Yes" to living will.

16. Do you want to be cremated?

Husband: Yes _____ No _____

Wife: Yes _____ No _____

17. Do you wish to donate your organs for transplant?

Husband: Yes _____ No _____

Wife: Yes _____ No _____

18. Do you want a Mental Healthcare Power of Attorney?

Husband Yes _____ No _____

Wife Yes _____ No _____

REGARDING ARIZONA TRUSTS ONLY:

19. When one spouse dies, should the trustee (usually, the surviving spouse) be required to notify the final heirs of their rights under the trust?
(Please circle one) **Yes or No**

20. Who should resolve a dispute between the trustee and a trust beneficiary?
(The decision is non-binding; both parties have to agree to accept this person's decision):

Providing Financial Solutions

8801 W. Union Hills Drive, Building C, Peoria, Arizona 85382
Phone (623) 875-5266 · WMI Toll Free 1-888-91-ASSET · Fax (623) 875-3681
www.wealthadvantage4u.com

Heirs (anyone who will receive a distribution) and successor trustees
(persons who will run the trust):

a) Name: _____

Nickname: _____

Address: _____

Phone: _____ Date of Birth: _____

SSN: _____ Relationship: _____

b) Name: _____

Nickname: _____

Address: _____

Phone: _____ Date of Birth: _____

SSN: _____ Relationship: _____

c) Name: _____

Nickname: _____

Address: _____

Phone: _____ Date of Birth: _____

SSN: _____ Relationship: _____

d) Name: _____

Nickname: _____

Address: _____

Phone: _____ Date of Birth: _____

Providing Financial Solutions

8801 W. Union Hills Drive, Building C, Peoria, Arizona 85382
Phone (623) 875-5266 · WMI Toll Free 1-888-91-ASSET · Fax (623) 875-3681
www.wealthadvantage4u.com

SSN: _____ Relationship: _____

e) Name: _____

Nickname: _____

Address: _____

Phone: _____ Date of Birth: _____

SSN: _____ Relationship: _____

f) Name: _____

Nickname: _____

Address: _____

Phone: _____ Date of Birth: _____

SSN: _____ Relationship: _____

g) Name: _____

Nickname: _____

Address: _____

Phone: _____ Date of Birth: _____

SSN: _____ Relationship: _____

h) Name: _____

Nickname: _____

Address: _____

Phone: _____ Date of Birth: _____

SSN: _____ Relationship: _____

Providing Financial Solutions

8801 W. Union Hills Drive, Building C, Peoria, Arizona 85382
Phone (623) 875-5266 · WMI Toll Free 1-888-91-ASSET · Fax (623) 875-3681
www.wealthadvantage4u.com