

**LAW OFFICES OF ROBERT J. MONDO**

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This document is needed so that I can design the trust program that best fits your needs. Please be as complete as possible in your answers and if supporting documentation needs to be attached, please do so. Also if you require more room, please use the backside of the page and indicate the question number that you are completing.

**Definitions**

**Grantor:** The person(s) who are setting up the trust and providing the assets which will be included in the trust.

**Trustee(s):** The trustee is the person(s) that the grantor(s) designate to facilitate his/her wishes in the trust. The trustee(s) also have legal title to the trust assets. The trustee is given the responsibility to protect the trust assets and in some instances, produce income using the trust assets.

**Grantor Information:**

Your Name: \_\_\_\_\_

Your Social Security Number: \_\_\_\_\_

Address: \_\_\_\_\_

City, State Zip: \_\_\_\_\_

County: \_\_\_\_\_ Telephone No.: \_\_\_\_\_

**A. Selecting a Trustee**

A trustee is someone that you feel that is trustworthy and able to carry out your wishes. Please select a person and an alternate to act as the trustees for your trust. Before doing so, it is advisable to speak with these persons and discuss your intention to have these persons act as trustee and alternate trustee for the trust. Normally, in a living trust, the grantor acts as trustee.

You will be named trustee, but you will need to name a successor trustee. Please do so below:

Alternate Trustee Name: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

**B. Beneficiary Designation**

Please complete the following to show to whom you would like the benefits of the trust to flow and the percentage of the trust each is to receive. If you would like to leave specific assets to specific beneficiaries, please complete § E Gifts To Specific Beneficiaries.

1. \_\_\_\_\_ % \_\_\_\_\_  
(Name)

City: \_\_\_\_\_ State: \_\_\_\_\_

2. \_\_\_\_\_ % \_\_\_\_\_  
(Name)

City: \_\_\_\_\_ State: \_\_\_\_\_

3. \_\_\_\_\_ % \_\_\_\_\_  
(Name)

City: \_\_\_\_\_ State: \_\_\_\_\_

4. \_\_\_\_\_ % \_\_\_\_\_  
(Name)

City: \_\_\_\_\_ State: \_\_\_\_\_

5. \_\_\_\_\_ % \_\_\_\_\_  
(Name)

City: \_\_\_\_\_ State: \_\_\_\_\_

6. \_\_\_\_\_ % \_\_\_\_\_  
(Name)

City: \_\_\_\_\_ State: \_\_\_\_\_

7. \_\_\_\_\_ % \_\_\_\_\_  
(Name)

City: \_\_\_\_\_ State: \_\_\_\_\_

8. \_\_\_\_\_ % \_\_\_\_\_  
(Name)

City: \_\_\_\_\_ State: \_\_\_\_\_

9. \_\_\_\_\_ % \_\_\_\_\_  
(Name)

City: \_\_\_\_\_ State: \_\_\_\_\_

**ESTATE PLANNING ACCESSORY DOCUMENTS**

**A. Durable Power of Attorney Representative Identification**

Your First Choice

One Personal Representative: \_\_\_\_\_  
(Person's Full Name)

City/State of Representative: \_\_\_\_\_

Your Second Choice

One Alternate Representative: \_\_\_\_\_  
(Person's Full Name)

City/State of Alternate: \_\_\_\_\_

**B. Medical Power of Attorney Representative Identification**

Your First Choice

One Personal Representative: \_\_\_\_\_  
(Person's Full Name)

City/State of Representative: \_\_\_\_\_

Your Second Choice

One Alternate Representative: \_\_\_\_\_  
(Person's Full Name)

City/State of Alternate: \_\_\_\_\_

**TRUST FUNDING**

All of the supplemental estate planning documents (i.e. Powers of Attorney) are operative upon execution, witnessing and notarization. Your trust is not operative until it has been funded with your assets. Assets include all real property, financial assets, vehicles and other tangible and intangible assets.

**Real Estate**

As to the real estate, I will need the Permanent Index Number (P.I.N.) and legal description of each piece of real property. I will use this information to place your real estate in the name of your trust by filing deeds with the appropriate counties and/or states.

**Financial Assets**

Upon completion of the trust, you will need to execute forms provided by the financial institutions in which your funds are on deposit or invested. I will assist you in these matters.

**Other Assets**

Assets, not specifically real estate or financial, are transferred into your trust by operation of law and the execution of the trust.