

LAW OFFICES OF ROBERT J. MONDO

P.O. Box 72668

Roselle, IL 60172

630-215-3676 Fax: 630-894-8860

bob@lawrjm.com www.lawrjm.com

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 (s): 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.

Questions and Explanations

Grantor Information (You and Your Spouse):

Your Name: _____
(Grantor # 1)

Grantor # 1 Social Security Number: _____

Spouse Name: _____
(Grantor # 2)

Grantor Address: _____

City, State Zip: _____

County: _____ Home Phone #: _____

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(s) act as trustee.

You will be named trustee with your spouse, 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: _____

ESTATE PLANNING ACCESSORY DOCUMENTS

Please name only one personal and medical representative. If an alternate representative is chosen, name only one personal and one medical alternate representative. Normally, spouses are each other's first choice as personal representative. If this is your choice, then you need only name an alternate representative.

A. Durable Power of Attorney Representative Identification

1. Grantor #1

One Personal Representative: _____
(Person's Full Name)

City/State of Representative: _____

One Alternate Representative: _____
(Person's Full Name)

City/State of Alternate: _____

2. Grantor #2 (Spouse)

One Personal Representative: _____
(Person's Full Name)

City/State of Representative: _____

One Alternate Representative: _____
(Person's Full Name)

City/State of Alternate: _____

B. Medical Power of Attorney Representative Identification

1. Grantor #1

One Personal Representative: _____
(Person's Full Name)

City/State of Representative: _____

One Alternate Representative: _____
(Person's Full Name)

City/State of Alternate: _____

2. Grantor #2

One Personal Representative: _____
(Person's Full Name)

City/State of Representative: _____

One Alternate Representative: _____
(Person's Full Name)

City/State of Alternate: _____

GUARDIANSHIP OF MINOR CHILDREN APPOINTMENT

In the case of your demise, you need to name a person or persons who will be responsible for your children. Please complete the following:

First choice as to Guardian: _____

City/State of Guardian: _____

Second choice as to Guardian: _____

City/State of Guardian: _____

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.

Separately Held Property

If you have property that is separate from your spouse and has never been commingled with marital property please list and identify the asset(s). Also, if you have a specific beneficiary(s) for the asset(s), please also indicate the beneficiary's name and percentage share of each asset.

Owner Name	Type of Asset	Beneficiary Designation	Percentage Share
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____