

Trust Questionnaire

Prepared for Lisa K. Crawford, Esq., PLLC

Section A – Contact Information

Name:

Address:

Email:

Phone:

Section B – Trust Details

Trust Name:

Type of Trust:

Revocable Living Trust

Irrevocable Trust

Section C – Trustee Designations

Initial Trustee:

Co-Trustee(s):

Successor Trustee(s):

Section D – Trust Beneficiaries

Primary Beneficiaries:

Alternate Beneficiaries:

Section E – Trust Assets

Real estate

Bank accounts

Investment accounts

Business interests

Life insurance policies

Other: _____