

ESTATE PLANNING

Trust application | Your details

Full legal name

Date of birth

State / jurisdiction

Mailing address

Email (optional)

Spouse / partner and children

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Trust application | People you choose

Primary executor / trustee

Alternate executor / trustee

Guardian wishes for minor children

Contact details for nominated people

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Trust application | Your wishes

Proposed trust name

Beneficiaries and intended shares

Specific gifts / distribution wishes

Asset summary (omit account numbers)

Additional instructions / questions

Assets proposed for trust funding