

Family Trust Checklist

For the family trust that needs to be created, please fill out the following checklist and return it back to us with your information attached.

General Information	Provide Details
1. Suggest three names for the family trust ordered in preference.	<i>(Eg. The Smith Family Trust)</i> Name 1: _____ Name 2: _____ Name 3: _____
2. Provide the full name and address of two trustees.	Name : _____ Address : _____ Name : _____ Address : _____ Name : _____ Address : _____
3. Provide the full name and address of the settler who has to be third party. The role of the settler is to contribute \$20.00 to establish the trust.	Name : _____ Address : _____
4. Full name, address, and age of the beneficiaries of the trust.	Name : _____ Address : _____ Age : ____ Name : _____ Address : _____ Age : ____ Name : _____ Address : _____ Age : ____

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	Name : _____ Address : _____ Age : ____
	Name : _____ Address : _____ Age : ____
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	Name : _____ Address : _____ Age : ____
	Name : _____ Address : _____ Age : ____
	Name : _____ Address : _____ Age : ____