|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | | |  | | | | |  | |  |
| Date Submitted: | | | |  | | | | | | |
| Name of Trust: | | | |  | | | Trust County: | |  | |
| Trust Physical Address: | | | |  | | | Trust State: | |  | |
| Trust City: | | | |  | | |  | |  | |
| **CREATOR #1 (creator of the trust)** | | | | | | **CREATOR #2 (Optional) (wife, husband, friend, etc.)** | | | | |
| Creator#1 (Name) | |  | | | | Creator#2 (Name) | | |  | |
| Address | |  | | | | Address | | |  | |
| City | |  | | | | City | | |  | |
| State | |  | | | | State | | |  | |
| Zip Code | |  | | | | Zip Code | | |  | |
| Telephone Number | |  | | | | Telephone Number | | |  | |
| TRUST MANAGER: (usually one of the Creators but doesn’t have to be) | | | | | | TRUST SECRETARY: (Can also be one of the Creators but doesn’t have to be) | | | | |
| Name | |  | | | | Name | | |  | |
| Address | |  | | | | Address | | |  | |
| City | |  | | | | City | | |  | |
| State | |  | | | | State | | |  | |
| Zip Code | |  | | | | Zip Code | | |  | |
| Telephone Number | |  | | | | Telephone Number | | |  | |
| SUCCESSOR TRUST MANAGER: (After incapacity of current Manager usually one of the Beneficiaries) | | | | | | SUCCESSOR TRUST SECRETARY: (After incapacity of current Secretary usually one of the Beneficiaries) | | | | |
| Name | |  | | | | Name | | |  | |
| Address | |  | | | | Address | | |  | |
| City | |  | | | | City | | |  | |
| State | |  | | | | State | | |  | |
| Zip Code | |  | | | | Zip Code | | |  | |
| Telephone Number | |  | | | | Telephone Number | | |  | |
| **INDEPENDENT TRUSTEE #1 (Cannot be a Creator/beneficiary cannot be related to the Creators by blood, marriage or employment)** | | | | | | **TRUSTEE #2 (Cannot be a Creator/beneficiary)** | | | | |
| Trustee#1 (Name) | |  | | | | Trustee#2 (Name) | | |  | |
| Address | |  | | | | Address | | |  | |
| City | |  | | | | City | | |  | |
| State | |  | | | | State | | |  | |
| Zip Code | |  | | | | Zip Code | | |  | |
| Telephone Number | |  | | | | Telephone Number | | |  | |
| *Minimum of two Trustees. Protector has no access to Trust, is only for firing Trustee(s) when directed by Manager* | | | | | | | | | | |
| **EMERGENCY TRUSTEE #3** (optional not necessary) | | | | | | **PROTECTOR (Cannot be Trustees or Creator/beneficiary)** | | | | |
| Trustee#1 Name | |  | | | | Name | | |  | |
| Address | |  | | | | Address | | |  | |
| City | |  | | | | City | | |  | |
| State | |  | | | | State | | |  | |
| Zip Code | |  | | | | Zip Code | | |  | |
| Telephone Number | |  | | | | Telephone Number | | |  | |
|  | | | | | **SUCCESSOR BENEFICIARIES\*** | | | | | |
| Successor Beneficiary #1 | | | |  | |
| Successor Beneficiary #2 | | | |  | |
|  | | | | | Successor Beneficiary #3 | | | |  | |
|  |  | | | | Successor Beneficiary #4 | | | |  | |
|  |  | | | | Successor Beneficiary #6 | | | |  | |
|  |  | | | | Successor Beneficiary #7 | | | |  | |
|  |  | | | | Successor Beneficiary #8 | | | |  | |