|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |
| 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 |  |