

# Wills and trusts

## Trust agreements

Do you or your spouse have trust agreements? \_\_\_\_\_

Type of trust (testamentary trust, living trust, etc.): \_\_\_\_\_

Location of: \_\_\_\_\_

Value of assets held in trust: \_\_\_\_\_

Income from trust: \_\_\_\_\_

Name of trust: \_\_\_\_\_

Date of trust: \_\_\_\_\_

Trustee(s): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone number: \_\_\_\_\_

Beneficiaries: \_\_\_\_\_

\_\_\_\_\_

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Income from trust: \_\_\_\_\_

Name of trust: \_\_\_\_\_

Date of trust: \_\_\_\_\_

Trustee(s) : \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone number: \_\_\_\_\_

Beneficiaries: \_\_\_\_\_

\_\_\_\_\_