

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

RUSHFORTH LEE & KIEFER LLP

A NEVADA LIMITED-LIABILITY PARTNERSHIP

IRREVOCABLE TRUST OTHER THAN SELF-SETTLED SPENDTHRIFT TRUST

1. CLIENTS; CLIENT AND SIGNIFICANT OTHER

CLIENT		CLIENT #2 / SIGNIFICANT OTHER		MAILING ADDRESS	
Full Name (as it appears on legal documents) []-Not US citizen		Full Name (as it appears on legal documents) []-Not US citizen			
Name (as you want it in your documents)		Name (as you want it in your documents)			
Birth Date		Birth Date			
Social Sec. #		Social Sec. #			
Internet e-mail address:	Work Phone:	Internet e-mail address:	Work Phone:	Home Phone:	Fax:

2. CHILDREN & BENEFICIARIES. (Name all children and the children of each deceased child, including those who will receive nothing. Attach additional sheets if necessary. **Spell the names as you want them in the documents**) Please attach a written, plain-English explanation of how you want the assets of your irrevocable trust distributed, specifying percentages and how much is to be distributed when and on what basis (installments? income only? lump sum? age or other triggering event?, discretionary?, etc.).

NAME (OPTIONAL - SOCIAL SECURITY NUMBER) (SPECIFY RELATIONSHIP IF NOT CHILD.)	BIRTH DATE SEX	ADDRESS AND PHONE	RELATED TO: * (Check One)
	M F		1 2 Both
	M F		1 2 Both
	M F		1 2 Both
	M F		1 2 Both
	M F		1 2 Both
	M F		1 2 Both

*1=Client #1; 2=Client #2 or Significant Other

3. FIDUCIARIES AND ALTERNATES. (Include name, address & phone. If each client wants different fiduciaries, attach an explanation. If not applicable, leave blank.)

CAPACITY	FIRST CHOICE	SECOND CHOICE	THIRD CHOICE
TRUSTEE			

CAPACITY	FIRST CHOICE	SECOND CHOICE	THIRD CHOICE
INVESTMENT ADVISOR. To advise the Trustee as to trust investments. (See also item 4.g.)			
TRUST PROTECTOR. To remove and replace a trustee when the Settlor cannot do it. (See also item 4.f.)			
LOAN DIRECTOR. Non-beneficiary related or subordinate party with power to direct loans to Settlor without adequate security.			

4. CUSTOM PROVISIONS.

- a. Is this trust to be a generation-skipping trust? *Check one:* YES NO.

A "generation-skipping trust" is one that defers final distribution to grandchildren or lower generations, providing for either (i) no distributions or (ii) income distributions with or without discretionary principal distributions to the children. If you want your children to have the trust assets distributed to them, either as a lump sum or in stages, circle *NO*, even if the trust is to be distributed to your grandchildren who are children of a deceased child.

- b. If 4.a is YES, is this trust to be a dynasty trust? *Check one:* YES NO.

A "dynasty trust" is a trust that lasts for multiple generations, usually terminating (1) when the assets are fully distributed or (2) 365 years after the creation of the trust, whichever occurs first. Until the trust must terminate, all assets stay in trust except as distributed in the trustee's discretion.

- c. Separate trust for each client? *Check one:* YES NO.

- d. Is the significant other of the client a trust beneficiary? *Check one:* YES NO. If there are separate trusts, only one trust can include the settlor's significant other. If so, which one? -Client #2/SO is beneficiary of trust created by Client; -Client is beneficiary of trust created by Client #2/SO.

- i. Discretionary.
ii. Income/unitrust.
iii. Other:

- e. Is this trust to be a "grantor trust" for income tax purposes? -Settlor; -Beneficiary -NO.

- f. What powers are to be given the Trust Protector? (*Check all that apply.*)

- Power to remove the trustee or any co-trustee.
 -Power to replace the trustee or any co-trustee.
 -Power to appoint a special trustee.
 -Power to veto the removal or designation of a trustee that is made by a beneficiary or a group of beneficiaries.
 -The power to employ a CPA at trust expense to audit the trustee's records and account; and/or
 -The power to petition a court to enforce the provisions of the trust.
 -Power to add beneficiaries: (*Check all that apply.*)
 -The settlor(s), if initially excluded as beneficiary(ies).
 -Descendants of the parents of the settlor(s). -Excluding the settlor(s).
 -Descendants of the grandparents of the settlor(s). -Excluding the settlor(s).
 -One or more qualified charities.
 -Others. *Please specify:*

-Other powers. *Please specify:*

- g. Is the Trustee required to follow the investment directives of the Investment Advisor?
Check one: YES NO. (If YES, the Trustee will have no liability for investment decisions.)
Check one: If NO, is the Trustee to be absolved of liability if he/she follows the recommendations? YES NO.

h. If this trust will own life insurance:

i. Who will be insured on policies owned by this trust? -Client; -Client #2/SO; -Both.

ii. How will policy premiums be paid? *Check all that apply:*

- (1) Gifts of separate property from Client.
- (2) Gifts of separate property from Client #2/SO.
- (3) Gifts of community property.
- (4) Income from trust-owned assets.
- (5) Premium financing.

5. ADDITIONAL INFORMATION.

Name of Trust:		
Assets to be Owned by Trust	Life Insurance: \$	Other Assets: \$
Referred by:		

Office use only:

Trust Distribution: DST: _____ Age: _____ BenPOA: Life&Death; Death Only; None.
BenInc: Discr; Req; Mand. Base Fee \$ Retainer Fee \$