

If you believe you may want to establish a trust as your primary estate-planning mechanism, please fill out the following supplemental information if the information is not already included in the main questionnaire.

1. List your assets and the value of each asset. If an asset has a loan against it, list the amount of the loan currently outstanding. Categories of property to consider include: Real estate, household goods, vehicles, bank accounts, investments, retirement funds, life insurance, etc.

2. Set out the scheme of distribution of property after both you and your spouse die. Include the amount or percentage to go to each person. Give the name, relationship, and address of each recipient. If you want any restrictions on any recipient's receipt of money or other assets (such as a minimum age), list those restrictions.