

Based on the information that you supply Dawson Legal Documents & Services LLC in this questionnaire we will prepare your Revocable Living Trust.

The cost to prepare your trust is \$500.00.

DAWSON LEGAL DOCUMENTS & SERVICES

CONFIDENTIAL CLIENT QUESTIONNAIRE – LIVING TRUST

I understand that Dawson Legal Documents & Services LLC is an Arizona Legal Document Preparation Company and the personnel are Arizona Certified Legal Document Preparers and are not attorneys and cannot give legal advice or opinion. Though Dawson Legal Documents & Services LLC must respect client confidentiality, no Attorney/Client Privilege exists.

Dawson Legal Documents & Services LLC can tell you legal facts and explain options you may have but we cannot advise or recommend to you what options to select.

Definitions:

TRUSTOR:	The trustor(s) is the person who funds the trust.
TRUSTEE:	The trustee(s) is the person who manages the trust.
SUCCESSOR TRUSTEE:	The successor trustee is the person who will manage your trust when you are incapacitated or at the death of the last living trustor.

Dawson Legal Documents & Services LLC
2855 S 4th Ave, Ste 120
Yuma, AZ 85364
928 726-6661

TRUSTOR INFORMATION

Name As it is to appear in the Trust: _____
Mailing address: _____
Phone number: _____

CO-TRUSTOR INFORMATION – You do not need a Co-Trustor.

Name As it is to appear in the Trust: _____
Mailing address: _____
Phone number: _____

TRUSTEE INFORMATION

If the same as above TRUSTOR please check here

Name as it is to appear in the Trust: _____
Mailing address: _____
Phone number: _____

CO-TRUSTEE INFORMATION

If the same as above CO-TRUSTOR please check here

Name As it is to appear in the Trust: _____

Mailing address: _____

Phone number: _____

SUCCESSOR TRUSTEE INFORMATION – This is the person who will administer the Trust after the last Trustor dies.

Name As it is to appear in the Trust: _____

Mailing address: _____

Phone number: _____

ALTERNATE SUCCESSOR TRUSTEE INFORMATION – You can add an alternate successor trustee if the first one cannot or will not act for some reason. An Alternate Successor is not required but is a fall back should the Successor Trustee be unable to perform his or her duties.

Name As it is to appear in the Trust: _____

Mailing address: _____

Phone number: _____

GENERAL POWER OF ATTORNEY INFORMATION FOR THE TRUSTOR

If you would like a General Power of Attorney included with this trust please fill in the information below.

Agent's Name: _____

Mailing address: _____

Phone number: _____

Alternate Agent's Name: _____

Mailing address: _____

Phone number: _____

A witness is needed for this Power-of-Attorney. Please give the following information about the witness.

Name As it is to appear in the POA: _____

County & State of residence: _____

GENERAL POWER OF ATTORNEY INFORMATION FOR THE CO-TRUSTEE IF ONE IS NAMED

If you would like a General Power of Attorney included with this trust please fill in the information below.

Agent's Name: _____

Mailing address: _____

Phone number: _____

Alternate Agent's Name: _____

Mailing address: _____

Phone number: _____

A witness is needed for this Power-of-Attorney. Please give the following information about the witness.

Name As it is to appear in the POA: _____

County & State of residence: _____

HEALTH CARE POWER OF ATTORNEY INFORMATION FOR THE TRUSTOR IF ONE IS NAMED

If you would like a Health Care Power of Attorney included with this trust please fill in the information below.

Agent's Name: _____

Mailing address: _____

Phone number: _____

Alternate Agent's Name: _____

Mailing address: _____

Phone number: _____

HEALTH CARE POWER OF ATTORNEY INFORMATION FOR THE CO-TRUSTEE IF ONE IS NAMED

If you would like a Health Care Power of Attorney included with this trust please fill in the information below.

Agent's Name: _____

Mailing address: _____

Phone number: _____

Alternate Agent's Name: _____

Mailing address: _____

Phone number: _____

POUR OVER WILL INFORMATION.

The Pour Over Will puts those things that you own, but are not in the trust, into the trust after your death. It needs to be probated. If you put all of your assets into the trust the need for this Pour Over Will is obviated. It is just a backup up device.

This information pertains to the person you designate as your personal representative.

Name As it is to appear in the Will: _____

Mailing address: _____

Phone number: _____

Alternate Personnel Representative – If the above Personnel Representative cannot or will not administer this Will who is going to do it? This is not required.

Name As it is to appear in the Will: _____

Mailing address: _____

Phone number: _____

Two witnesses are required for your will. Please give the following information for the witnesses.

1. Name: _____

County & State of residence: _____

2. Name: _____

County & State of residence: _____

POUR OVER WILL INFORMATION FOR THE CO-TRUSTEE IF ONE IS NAMED.

This information pertains to the person you designate as your personal representative.

Name As it is to appear in the Will: _____

Mailing address: _____

Phone number: _____

Alternate Personnel Representative – If the above Personnel Representative cannot or will not administer this Will who is going to do it? This is not required.

Name As it is to appear in the Will: _____

Mailing address: _____

Phone number: _____

Two witnesses are required for your will. Please give the following information for the witnesses.

1. Name: _____

County & State of residence: _____

2. Name: _____

County & State of residence: _____

TRUST NAME – All Trusts must have a name.

Name of trust: _____

FAMILY INFORMATION. (Trustor)

If you are married please give your spouse's name: _____

If you have children please name them: _____

FAMILY INFORMATION. (Co-Trustor)

If you are married please give your spouse's name: _____

If you have children please name them: _____

INITIAL FUNDING

For a trust to exist it must be funded by putting something into it. You could open a Bank Account in the Trust's name, transfer a car or Real Estate or other titled things into the Trust. As part of this Trust Package Dawson Legal Documents and Services will prepare up to four (4) Arizona realty deeds for you to fund your trust. Please describe what you are using to fund your trust.

Payment is due on your acceptance of your Trust Documents.

Date: _____
Signature

After completing this questionnaire please bring it to our office or mail it to us and we will start preparing your Trust Documents.

PLEASE CALL OUR OFFICE AT 928 726-6661 WITH ANY QUESTIONS. ASK FOR DAN.
YOU ARE ALWAYS WELCOME TO STOP IN AND SEE DAN BUT PLEASE CALL FIRST TO
MAKE SURE HE IS IN THE OFFICE AND AVAILABLE.

OUR ADDRESS IS 2855 SOUTH 4TH AVE, STE 120, YUMA, AZ 85364.