

GOTHARD WATERS

ATTORNEYS AT LAW

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Appointment Date: _____ Time: _____

TRUST ADMINISTRATION FORM

ABOUT THE DECEASED (also known as the Decedent):

Full Legal Name: _____ SSN: _____

Date of Birth: _____ Date of Death: _____ Age: _____

Residence: _____

Street

City

State

Zip

County

Occupation/Employer: _____

Safe Deposit box? _____ Yes _____ No

If so, Location: _____ Box No.: _____

Name(s) on Box: _____

Costs of Funeral/Burial: _____ Paid by: _____

Do you expect anyone to contest the Decedent's Trust? _____

Was the Decedent a resident of a nursing home? _____ If so, for how long? _____

MARITAL STATUS OF DECEDENT:

Full Legal Name of Spouse: _____

Date and Place of Marriage: _____

Spouse's Date of Birth: _____ Spouse's Date of Death (if applicable): _____

Spouse's SSN: _____ US Citizen? _____

Occupation/Employer: _____

Was the Decedent party to a Prenuptial Agreement (i.e. Antenuptial Agreement) or Postnuptial Agreement? _____

Is/was the Decedent's spouse a resident of a nursing home? _____ If so, for how long? _____

ABOUT THE SUCCESSOR TRUSTEE(S):

A. Successor Trustee's Name: _____

Mailing Address: _____

Street

City

State

Zip

County

Relationship: _____ SSN: _____

Telephone: (Home) _____ (Work) _____

(Cell) _____

Occupation/Employer: _____

Email Address: _____ Is this a work email? _____

Do you consent to the transmission of confidential information to you via email?

Yes _____ No _____

Investments (Stocks, Bonds, and Marketable Securities):

Financial Institution:	Type of Account/ Account Number:	Account Owner(s):	Value at Death:
_____	_____	_____	_____
_____	_____	_____	_____

Life Insurance:

Life Insurance Company:	Policy Number:	Beneficiary	Value at Death:
_____	_____	_____	_____
_____	_____	_____	_____

Automobiles and Other Vehicles/Boats:

Year, Make, and Model:	Owner(s)	Value at Death:
_____	_____	_____
_____	_____	_____

Other Assets (Including Household Goods/Furnishings):

	Value at Death:
_____	_____
_____	_____

DECEDENT'S DEBTS:

House Mortgage Payable To:	Balance Due:
_____	_____
_____	_____

Automobile Loans Payable To:	Balance Due:
_____	_____
_____	_____

Credit Cards Payable To:	Balance Due:
_____	_____
_____	_____

Medical Bills Payable To (<i>Please bring copies</i>):	Balance Due:
_____	_____
_____	_____

Loans Payable To:	Balance Due:
_____	_____
_____	_____

Other Debts:

Balance Due:

REFERRAL:

Were you referred by anyone? If so, who? _____

If not, how did you hear about us? _____

Is it ok for us to thank the person who referred you? Yes _____ No _____

Last updated March 7, 2019