



# LAW OFFICE OF DAVID PICKARD

ATTORNEY AT LAW

## Revocable Living Trust Client Questionnaire

Please indicate whether this is a(n):

- Individual Revocable Trust
- Joint Property Revocable Trust
- Community Property Revocable Trust
- Qualified Domestic Trust

Briefly describe your estate planning goals: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please provide the following information:

1. Information about you:

Client's Name: \_\_\_\_\_  
Former Names/Alias: \_\_\_\_\_  
Date of Birth (DOB): \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

Relationship Status:      Single   /   Married

If applicable:

Spouse's Name: \_\_\_\_\_  
Former Names/Alias: \_\_\_\_\_  
Date of Birth (DOB): \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_



Revocable Living Trust Client Questionnaire

Children (\*Note: *JT=Joint children, C=Client's Children, or S=Spouse's Children.*

Please print names just as you want them to appear in documents)

Child's Name: \_\_\_\_\_ JT / C / S  
Former Names/Alias: \_\_\_\_\_  
Date of Birth (DOB): \_\_\_\_\_ Gender: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone # \_\_\_\_\_

Child's Name: \_\_\_\_\_ JT / C / S  
Former Names/Alias: \_\_\_\_\_  
Date of Birth (DOB): \_\_\_\_\_ Gender: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone # \_\_\_\_\_

Child's Name: \_\_\_\_\_ JT / C / S  
Former Names/Alias: \_\_\_\_\_  
Date of Birth (DOB): \_\_\_\_\_ Gender: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone # \_\_\_\_\_

Child's Name: \_\_\_\_\_ JT / C / S  
Former Names/Alias: \_\_\_\_\_  
Date of Birth (DOB): \_\_\_\_\_ Gender: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone # \_\_\_\_\_

Child's Name: \_\_\_\_\_ JT / C / S  
Former Names/Alias: \_\_\_\_\_  
Date of Birth (DOB): \_\_\_\_\_ Gender: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone # \_\_\_\_\_

Revocable Living Trust Client Questionnaire

2. Please list below who you would like to be Trustee(s) of the trust (\*Note: This can be a self-trusted trust)

Trustee(s):                     Self-Trusted Trust

or

Name: \_\_\_\_\_

Address \_\_\_\_\_

Name: \_\_\_\_\_

Address \_\_\_\_\_

Successor Trustee(s):      Name: \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone # \_\_\_\_\_

Name: \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone # \_\_\_\_\_

Alt. Successor Trustee(s): Name: \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone # \_\_\_\_\_

Revocable Living Trust Client Questionnaire

3. Please list below who you would like to be the beneficiary(ies) of the trust:

Beneficiary(ies):	Name:	_____
	Address	_____ _____
	Name:	_____
	Address	_____ _____
	Name:	_____
	Address	_____ _____
	Name:	_____
	Address	_____ _____

4. How would you like your trust to be distributed (percentages, specific amount)?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. List any and all real property held in your name that you would like to become part of the trust property:

Revocable Living Trust Client Questionnaire

Real Property 1: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Real Property 2: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Real Property 3: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. List any and all bank, stock brokerage, and other financial and securities accounts of any kind (but excluding those 401k and IRA retirement accounts) that you would like to become part of the trust property

Account 1: Banking Institution: \_\_\_\_\_  
Account Number: \_\_\_\_\_

Account 2: Banking Institution: \_\_\_\_\_  
Account Number: \_\_\_\_\_

Account 3: Banking Institution: \_\_\_\_\_  
Account Number: \_\_\_\_\_

7. List any and all stocks, bonds, and other securities of any kind (excluding those held in 401k and IRA retirement accounts) that you would like to become part of the trust property :

Stocks: \_\_\_\_\_  
\_\_\_\_\_

Bonds: \_\_\_\_\_  
\_\_\_\_\_

Securities: \_\_\_\_\_  
\_\_\_\_\_

## Revocable Living Trust Client Questionnaire

8. List any specific property distributions you would like to make, as well as the name of the person you would like to give it to (Example: wedding and/or engagement rings, specific amounts of money, antiques, family heirlooms, etc.):

Specific Gift                      Property Description: \_\_\_\_\_

\_\_\_\_\_

Beneficiary                      \_\_\_\_\_

\_\_\_\_\_

Specific Gift                      Property Description: \_\_\_\_\_

\_\_\_\_\_

Beneficiary                      \_\_\_\_\_

\_\_\_\_\_

Specific Gift                      Property Description: \_\_\_\_\_

\_\_\_\_\_

Beneficiary                      \_\_\_\_\_

\_\_\_\_\_

Specific Gift                      Property Description: \_\_\_\_\_

\_\_\_\_\_

Beneficiary                      \_\_\_\_\_

\_\_\_\_\_

Specific Gift                      Property Description: \_\_\_\_\_

\_\_\_\_\_

Beneficiary                      \_\_\_\_\_

\_\_\_\_\_

9. Do you have any pets? What kind (cat, dog, bird, etc.)? If so, how would you like your successor trustee to re-home them?

---



---



---