

## Family Trust Checklist

For the family trust that needs to be created, please fill out the following checklist and return it back to us with your information attached.

General Information	Provide Details
<p><b>1.</b> Suggest three names for the family trust ordered in preference.</p>	<p><i>(Eg. The Smith Family Trust)</i></p> <p>Name 1: _____</p> <p>Name 2: _____</p> <p>Name 3: _____</p>
<p><b>2.</b> Provide the full name and address of two trustees.</p>	<p>Name : _____</p> <p>Address : _____</p> <p>Name : _____</p> <p>Address : _____</p> <p>Name : _____</p> <p>Address : _____</p>
<p><b>3.</b> Provide the full name and address of the settler who has to be third party. The role of the settler is to contribute \$10.00 to establish the trust.</p>	<p>Name : _____</p> <p>Address : _____</p>
<p><b>4.</b> Full name, address, and age of the beneficiaries of the trust.</p>	<p>Name : _____</p> <p>Address : _____</p> <p>Age : ____</p> <p>Name : _____</p> <p>Address : _____</p> <p>Age : ____</p> <p>Name : _____</p> <p>Address : _____</p> <p>Age : ____</p>