

MARY K. JEFFERS, ATTORNEY AT LAW
2677 North Main Street, Suite 460
Santa Ana, California 92705
(714) 347-0277

Full Legal Name: _____

Other Names (aka): _____

Address: _____

email: _____

Telephone No. (Home): _____

Telephone No. (Cell): _____

Spouse's Full Legal Name: _____

(Circle One): **Married** **Divorced** **Widowed** **Single**

(Circle One): **U.S. Citizen** **Not a U.S. Citizen**

Childrens Full Legal Names and Ages. If you are married, please let us know if these are not both Trustors' children:

Do you have any deceased children? If so, please provide the child's full legal name:

Please name your Successor Trustee(s) (Your Successor Trustees will manage your Trust upon your death or incapacitation).:

(Circle One): Will your Trustees act:

together

in the order designated?

Please name your Guardians for your minor children:

If you will not be providing for a spouse or a child in your trust, you must disinherit them (no other persons are required to be disinherited). Please name those persons whom you wish to disinherit:

Please name your Beneficiaries (Person(s) who will receive your estate after your death).

(Circle One) How are your beneficiaries to receive their shares?

immediately upon your death* *in stages

If your beneficiaries are to receive their shares in stages please describe at what age or over what period of time your beneficiaries are to receive their shares.

Please list your assets:

Real Estate: (address for each property)

Life Insurance:

Family Business:

Is this business a corporation?

Trust Deed Notes (where someone is paying you on a note):

Bank Accounts: (name of bank and type of account. Account No. is optional).

Stocks and Bonds:

Mutual Funds or Accounts with a Broker:

Annuities:

IRAs and Other Retirement Accounts:

Other Miscellaneous (Cemetery Plots, very valuable cars or collections)

Along with this completed form, the following additional information will be required to complete your trust:

- 1. Deed and assessor's parcel number for each piece of real property. You can get the assessor's parcel number off of your tax bills.***
- 2. Grant Deed or Quit Claim Deed for each piece of real property (including time shares) owned by you.***

If you cannot locate a deed or assessor's parcel number, please call my office for assistance.

Included in the price of your trust is the preparation and filing of two deeds. If you have more than two deeds, you will be charged for the recording fees of the additional deeds.