

## TESTAMENTARY TRUST SET UP CHECKLIST

Outlined below is a checklist of the information needed to complete a Testamentary Trust application.

### TRUST DETAILS

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- Desired name of Trust
- Specified Beneficiaries of the Trust (Optional)

### DETAILS PERTAINING TO BOTH THE WILL AND THE TRUST

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- State of Jurisdiction
- Testator
  - Name
  - Address
  - Occupation

### DETAILS PERTAINING TO THE WILL

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- Second Executor (Optional)
  - Name
  - Address
- Beneficiaries of the Will
- Specific Bequests to Beneficiaries of the Will (Optional)
- Nominated Guardian of Dependents (Optional)

### DETAILS PERTAINING TO THE TRUST

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- Trustee
  - Name
  - Address
- Is the Trust to be a Joint Testamentary Trust?
  - If yes, name of Spouse
  - Address

## BENEFICIARY DETAILS

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- Nominated Beneficiary Name(s)
- A.C.N. if above is company
- Additional Beneficiaries (Optional)
- A.C.N. if above is company
- Specific Exclusions (Optional)