

TRUST MATTERS
Confidential Information Sheet
Complete all information that applies to this petition.

Case Number: _____

Name of Trust: _____

When Created: _____ Created by whom: _____

Type of Trust: _____

Settlor(s) of Trust: _____

Settlor(s) Date of death: _____

Pour-over Will(s) created and by whom: _____ Date of Will(s): _____

Trustee(s): _____ Successor Trustee(s): _____

Trust Amendments and/or Restatements: _____

 Minor
 Adult
Beneficiary

 Minor
 Adult
Beneficiary

 Minor
 Adult
Beneficiary

 Minor
 Adult
Beneficiary

 Minor
 Adult
Beneficiary

 Minor
 Adult
Beneficiary

 Minor
 Adult
Contingent Beneficiary

 Minor
 Adult
Contingent Beneficiary