




Easy-Questionnaire™ **LIVING TRUST** Estimated Time To Complete: 15 Minutes


JUST 3 EASY STEPS™

Step 1: FILL IT OUT




Complete this Easy-Questionnaire™ at your convenience. If you need help filling it out, please call our Help Line.

Step 2: FAX IT IN



Return this Easy-Questionnaire™ to the agent, pay for the service, and have it faxed to our Data Center.

Step 3: AND FILE IT



Then, in just 3 - 5 business days, you receive your completed documents via mail with Easy Filing Instructions.

IT'S REALLY THAT EASY

HELP LINE

If you have any questions regarding this Easy-Questionnaire, please feel free to Call 800-895-1580 EXT 500.

Mon-Fri 9:00 AM – 9:00 PM PST,
Sat 9:00 AM – 3:00 PM PST

MONEY BACK GUARANTEE

We also offer you a Money Back Guarantee that our documents will be accepted by the Courts and/or Agencies they are to be filed with, if not and it is our fault, we will make any changes or provide any additional documents requested by the Courts at no additional costs to you. If we are unable to provide the additional documents or make the proper changes, we will fully refund you the full price of our service.

FAX YOUR COMPLETED QUESTIONNAIRE TO: 1-866-378-5285

CONFIRMATION CODE: The Confirmation Code is the Number that is on your Receipt given to you by the Agent when you pay for the Service. You can complete your Questionnaire at your convenience, and then go back to the Agent to pay for the Services. **PLEASE ENTER YOUR CONFIRMATION CODE IN THE BOX BELOW.**

CONFIRMATION CODE - *REQUIRED TO PROCESS THIS QUESTIONNAIRE													
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DISCLAIMER: We are not a law firm, and the Agents and employees of My Complete Case are not acting as your attorney or providing you with any legal advice. We do not practice law. We offer Document Preparation Assistance Services that includes a review of your document and answers for accuracy based on the information you are providing in this Questionnaire. You are exercising your Constitutional Rights to represent yourself in all matters that you execute utilizing our services.

SIGNATURE REQUIRED: _____ **Date:** _____

PHONE NUMBER: _____ To confirm we've received your Easy-Questionnaire.

OVER 10,000 DOCUMENTS PREPARED	OUR MISSION
Our Staff of Professional Document Preparers have over 20 years of experience, and have prepared over 10,000 legal documents.	To provide Professional Prepared High Quality Low Cost Legal Document Preparation Services to those who do not want to over pay for these services.

LIVING TRUST GLOSSARY

Beneficiaries	Those who will receive the benefit of the trust's assets are called beneficiaries. The grantor is the original beneficiary. Those who take after the grantor's death are "remainder beneficiaries."
Grantor	The person who sets up the trust; also called the settlor, trustor, or trustmaker.
Living Trust	A living trust (revocable living trust or inter vivos trust) is a type of trust created for the purpose of holding ownership to an individual's assets during the person's lifetime and for distributing those assets after death.
Trustee	This is the person who will manage the trust assets. This also may be the settlor in a Revocable Living Trust, since the settlor wants to manage his or her own property. Revocable Living Trust may also be called a "self settled trust."
Successor Trustee	This is the person who will manage the trust assets when the Grantor dies or if he becomes incapacitated. Upon the Grantor's death, the Successor Trustee will immediately have the same powers that the Grantor had to buy, sell, borrow, or transfer the assets inside the trust. Also, the Successor Trustee has the right to distribute the trust's assets according to the Grantor's instructions in the trust instrument. The Successor Trustee does not have the legal right to change the trust. The trust becomes irrevocable upon the Grantor's death. However, the Successor Trustee has the right to manage the assets in the estate, but must do so for the benefit of the remainder beneficiaries. At the Grantor's death, the Successor Trustee automatically takes over, without court order pays any debts, expenses and taxes that are directed to be paid and then distributes the property to the trust beneficiaries. Where the trust is to end on the Grantor's death, and the trust is merely a means of avoiding probate, the death beneficiary should ordinarily be named Successor Trustee.

The following describes the information that goes under each section heading on your Questionnaire.

SECTION 340 DATE OF CONTRACT	In this section effective date of the Trust. Where and when signed by both parties.
SECTION 341 GRANTOR	In this section list all of your current information. (Name, address, telephone, etc.)
SECTION 342 TRUSTEE	In this section list all of your trustee's current information. (Name, address, telephone, etc.)
SECTION 343 WITNESS(ES)	In this section list information about your witness or witnesses.
SECTION 344 SUCCESSOR TRUSTEE	The name of the successor trustee and list their contact information.
SECTION 345 DESC. OF PROPERTY	The real and personal property and beneficiaries of the trust.

SECTION 340 "DATE OF CONTRACT"	
REVOCABLE: The Trust can be changed, amended or ended at any time during your life.	
IRREVOCABLE: These Trusts, immediately upon their creation, are not amendable or revocable by you.	
Please Select the Type of Living Trust this will be: Revocable Irrevocable (Circle One)	
County Contract Signed In:	State Contract Signed In:

SECTION 341 "NAME OF GRANTOR"		
Name:		
Address:		
City:	State:	Zip:

SECTION 342 "NAME OF TRUSTEE"		
Name:		
Address:		
City:	State:	Zip:

SECTION 343 "NAME OF WITNESS"		
Name:		
Address:		
City:	State:	Zip:

SECTION 344 "SUCCESSOR TRUSTEE"		
Name:		
Address:		
City:	State:	Zip:

SECTION 345 "REAL AND PERSONAL PROPERTY"	
	Beneficiary Name(s) and Address(es):
	Beneficiary Name(s) and Address(es):
	Beneficiary Name(s) and Address(es):
	Beneficiary Name(s) and Address(es):
	Beneficiary Name(s) and Address(es):
	Beneficiary Name(s) and Address(es):

Notes and/or Special Instructions: