

WORKSHEET ONLY!

Use this form to collect all the information you need, then return to the website and complete the online trust application. This is **NOT** a trust application!

Henderson Trust Application Worksheet (no Mail Forwarding)

Please **carefully** complete this form so we may create a trust document tailored to you.

Please use upper and lower case for proper names (your trust's name, people's names, city, state, etc.), and add periods after initials in middle names.

Note: "B" trusts are not being offered online at this time.

TRUST TITLE

NAME OF TRUST: *

CREATION/EIN DATE: *

Enter the date your trust was created, if not today (MM/DD/YY)

SETTLORS & OFFICERS

As the person applying for and establishing a trust, you are called the trust Settlor. Two people, such as husband and wife, may be joint settlors, with each settlor having equal rights. This is called a Dual Settlor Trust.

SETTLOR (1) FIRST: * MIDDLE: LAST: *

ONLY ENTER SECOND SETTLOR IF YOU ARE CREATING A DUAL SETTLOR TRUST

SETTLOR (2) FIRST: MIDDLE: LAST:

TRUSTEE (1) FIRST: * MIDDLE: LAST: *

TRUSTEE (2) FIRST: * MIDDLE: LAST: *

SPECIAL POWER OF APPOINTMENT TRUSTEE FIRST: * MIDDLE: LAST: *

The Special Power of Appointment Trustee's sole purpose is to appoint a new trustee in the event that an existing trustee vacates the position or dies. TJ Henderson is willing to assume this role initially, but you are welcome to assign someone else if you so choose.

PROTECTOR TRUSTEE FIRST: * MIDDLE: LAST: *

The Protector Trustee helps interpret the trust for the trustees, appoint trustees as needed, and modify the trust in keeping with the law. TJ Henderson is willing to serve as your initial trust protector, or you can assign someone else if you so choose.

EXEC. DIRECTOR (SETTLOR): FIRST: * MIDDLE: LAST: *

EXEC. SECRETARY FIRST: * MIDDLE: LAST: *

THE EXEC. SECRETARY IS NORMALLY THE SECOND SETTLOR IN THE CASE OF A DUAL SETTLOR TRUST. IN THE CASE OF A SINGLE SETTLOR TRUST THE EXEC. SECRETARY IS NORMALLY THE SETTLOR.

BENEFICIARIES

BENEFICIARY (IES): (*SUGGESTED: **ONE INDIVIDUAL ONLY** IF DOING A & B TRUST SYSTEM)

*BENEFICIARY (1) FIRST: * MIDDLE: LAST: *

*BENEFICIARY (2) FIRST: MIDDLE: LAST:

*BENEFICIARY (3) FIRST: MIDDLE: LAST:

ASSETS

LIST OF ASSETS TO TRANSFER INTO TRUST: (ALL OR SOME IQD, VND, GOLD, HOME, AUTOS, ETC.)

Asset #1:

Asset #2:

Asset #3:

Asset #4:

Asset #5:

Asset #6:

TRUST ADDRESS

Enter the mailing address for your trust. This address will be used by the IRS and for bank correspondence.

STREET: * SUITE:

CITY: * COUNTY: * STATE: * ZIP: *

TRUST CHECKING ACCOUNT BANK

Your trust document includes a reference to a trust bank account. If you have a bank that you want to use, please enter the information below, so we can put the information on your checking account application. If you do not have a bank you plan to use leave the default "Cash" in Nevada, To Be Named." You can change banks or add details by creating a new Minute/amendment after your trust has been completed. To maintain the strength of domicile of your trust, your bank account must be in Nevada.

NAME OF BANK: *

STREET:

CITY, STATE, ZIP:

PERSONAL BANKER'S NAME:

PERSONAL BANKER'S E-MAIL:

BANK PHONE:

EMPLOYER'S IDENTIFICATION NUMBER (EIN) WORKSHEET

We can use the information entered above to create a worksheet that will speed up completing your Employee Identification Number (EIN) application.

Do you want an EIN worksheet to assist you with the EIN Application? YES NO

YOUR CONTACT INFORMATION (as Trust Settlor)

As the person applying for and establishing a trust, you are called the trust Settlor.

YOUR NAME, FIRST: * MIDDLE: LAST: *

STREET: * SUITE:

CITY: * STATE: * ZIP: *

PHONE (HOME): * PHONE (CELL):

EMAIL ADDRESS: *