

Revocable Living Trust Flow Questions

Below, are the questions your organization members will encounter as they complete the Revocable Living Trust Flow.

Before you begin:

1. What's inspiring you to make a Trust today?
2. How did you hear about us?
3. Are you interested in leaving a gift to a nonprofit? (Yes/No)

Basics

Basic Details

- Gender
- Birth Date, Phone Number, Address

Estate Planning Options

- Are you legally married? (Yes/No)
 - →Yes
 - What is your spouse's name?
- What is the approximate combined value of the property you plan to transfer through your Revocable Living Trust?
- Many people work with a professional Financial Advisor. Do you? (Yes/No/I would like help finding an advisor)
 - →Yes
 - You will be asked for their Advisor's Name and Email



Trust Details

- Do you want to update an existing trust that you already have? (Yes/No)
 - →Yes
 - You will be asked the Full Name of the existing trust and the Execution Date of the existing trust
- What would you like to name your trust?

Nominees

Children and Guardianship Minors

- Do you have any children? (Yes/No)
 - →Yes
 - What are the full legal names of your children?
 - Are any of your children under the age of 18?
 - →Yes
 - In order of preference, who would you like to be the child's guardian if your minor child were left parentless when you pass away?

Pet Care and Pet Care Takers

- Do you have any pets you would like to provide for in your trust? (Yes/No)
 - →Yes
 - Please enter a name and description (eg: Felix the black cat), and species for each pet:
 - How much money would you like to provide for your pets' needs (food, veterinary costs, etc)?
 - In order of preference, who should be responsible for taking care of your pets if you pass away?
 - Would you like to provide your pet caretaker with reasonable compensation for taking on this responsibility? (Yes/No)

Successor Trustees

Enter one or two people to serve as successor trustees. If you choose to add two people, they will share the responsibility of managing your affairs.



Alternate Successor Trustees	Enter one or two people to serve as alternate successor trustees. If you choose to add two people, they will share the responsibility of managing your affairs.
Will Executors	Choosing one to two executors of the pour-over will

Residuary

Charitable Gifts	Leaving a gift to an organization of your choice
Primary Beneficiaries	• Who should inherit your residual trust property when you pass away? • Please specify one or more beneficiaries below
Secondary Beneficiaries	• If [first beneficiary] does not survive you, to whom should their portion of the trust property go?
Takers of Last Resort	• Who should inherit your trust property if all of your named beneficiaries do not survive you?*

Property

Add Assets (Financial Account, Property, Jewelry, Other)

Custodians

- Do you want to appoint custodians for beneficiaries under the age of 25? (Yes/No)
 - →Yes
 - Custodians for Minors and Young Adults



Funeral

Funeral Wishes

- In order of preference, who will be responsible for carrying out your funeral and final resting place instructions?
- What are your wishes for your funeral service?
- What are your wishes for your body and final resting place?
- Choose any charities that you would like your loved ones to support in your memory

Provisions

No Contest Clause

- Would you like to include a no-contest clause in your documents? (Yes/No)

Trusts for Younger Beneficiaries

- Do you expect to have any beneficiaries or heirs that are under 40 years old? (Yes/No)
 - →Yes
 - How old should they be when they receive their full inheritance?
 - How should any income distributions be administered?
 - How should any principal distributions be administered?

