

Testamentary Trust Setup Information

Testator Information

Full Name

Date of Birth

Address

Executor Information

Executor Name

Relationship to Testator

Executor Address

Trustee Information

Trustee Name

Relationship to Testator

Trustee Address

Beneficiary Information

Beneficiary Name

Relationship to Testator

Share of Trust (%)

Trust Details

Assets Included in Trust

Distribution Instructions

Special Conditions (if any)