YOUR PEOPLE. YOUR ASSETS.

Trust planning

A simple, fillable workbook to help you prepare for your next conversation. Complete what you know and leave the rest for discussion.

01 / ABOUT YOU

First name

Last name

As shown on your legal documents.

Middle name (optional)

State of residence

Choose a state...

Your current home state.

Marital status

Choose an answer...

Choose the closest answer.

Planning only. This is not a legal will or trust. Keep account details and passwords on the separate private pages. No SSNs.

Use a PDF reader to fill the fields. Save a copy, reopen it to check your answers, and store it securely.

02 / YOUR PEOPLE

The people who matter.

Add names once. Use Person 1, Person 2, and Person 3 in later sections. These entries do not appoint anyone.

Person 1

First name

Last name

Relationship to you

Choose an answer...

If Other, explain in the notes.

Is this person under 18?

Choose an answer...

Age is for planning discussion.

Role(s) / notes

List proposed roles. One person may have more than one.

Person 2

First name

Last name

Relationship to you

Choose an answer...

If Other, explain in the notes.

Is this person under 18?

Choose an answer...

Age is for planning discussion.

Role(s) / notes

List proposed roles. One person may have more than one.

03 / CREATORS & TRUSTEES

Plan who manages what.

Record your first choices and backups. These are preliminary wishes for attorney review.

Person 3 (optional)

First name

Last name

Relationship to you

Choose an answer...

If Other, explain in the notes.

Is this person under 18?

Choose an answer...

Age is for planning discussion.

Role(s) / notes

List proposed roles. One person may have more than one.

Your trust team

Who would create the trust?

Choose an answer...

Second creator (if any)

If applicable.

Initial trustee

Proposed manager of trust assets.

Successor and backup trustee

Names or person numbers.

Timing and support wishes

Describe timing or support needs for attorney discussion.

04 / GIFTS & DISTRIBUTIONS

Put your wishes into words.

Use names or person numbers. You do not need legal language to record the ideas you want to discuss.

Main goal

Choose an answer...

A discussion topic, not a promised outcome.

Person to benefit

Example: Person 1. Use the numbered people above.

Gift / share and timing

Example: Proposed share and when you would like it distributed. Discuss suitability with counsel.

Backup and additional wishes

Example: Person 2 as backup; questions about other beneficiaries.

Include backup recipients, care needs, and family circumstances you want an attorney to consider. Attach another sheet if you need more room.

05 / TRUST FUNDING REVIEW

Give each asset a place.

Use broad descriptions here. This list does not transfer ownership or change account beneficiaries.

Asset 1

Asset type

Choose an answer...

Choose a category.

Asset name / description

Example: Home or savings.

Institution / location

Bank name or property state.

Ownership

Choose an answer...

Choose the closest answer.

Funding questions

Transfer / beneficiary questions.

Asset 2

Asset type

Choose an answer...

Choose a category.

Asset name / description

Example: Home or savings.

Institution / location

Bank name or property state.

Ownership

Choose an answer...

Choose the closest answer.

Funding questions

Transfer / beneficiary questions.

06 / REVIEW NOTES

Connect the remaining details.

Add one more asset and collect the questions you want answered. Bring existing documents to your attorney.

Asset 3 (optional)

Asset type

Choose an answer...

Choose a category.

Asset name / description

Example: Home or savings.

Institution / location

Bank name or property state.

Ownership

Choose an answer...

Choose the closest answer.

Funding questions

Transfer / beneficiary questions.

Before your consultation

Main asset category

Choose an answer...

Add other types in the notes.

Existing documents

Choose an answer...

Bring any existing documents to your review.

Additional assets / ownership notes

Example: Jointly owned home.

Questions for the attorney

Example: Who should I choose as a backup?

PRIVATE / KEEP SEPARATE

Private account record 1

Optional personal record. This PDF is not encrypted. Separate these pages before sharing your planning workbook.

Related asset number / account name

Example: Asset 1 or a familiar account name.

Institution / official login website

Use the institution's official website.

Account number (optional)

Optional. Stored as readable text.

Username / login ID (optional)

Optional. Keep private.

Password / password-manager reference (optional)

A password-manager reference is preferred.

Prefer a password-manager reference. Typed passwords are readable to anyone with the file. Do not email or upload completed private pages.

PRIVATE / KEEP SEPARATE

Private account record 2

Optional personal record. This PDF is not encrypted. Separate these pages before sharing your planning workbook.

Related asset number / account name

Example: Asset 1 or a familiar account name.

Institution / official login website

Use the institution's official website.

Account number (optional)

Optional. Stored as readable text.

Username / login ID (optional)

Optional. Keep private.

Password / password-manager reference (optional)

A password-manager reference is preferred.

Prefer a password-manager reference. Typed passwords are readable to anyone with the file. Do not email or upload completed private pages.

WHAT HAPPENS NEXT

You have a starting point.

Use your workbook to prepare for the appropriate legal steps. This form does not submit your answers or book an appointment.

01 **Review and save**

Check your people, roles, wishes, and assets. Save the PDF and reopen it to confirm your entries.

02 **Separate private records**

Keep account and password pages out of copies you share. Store them securely.

03 **Arrange legal review**

Consult an estate planning attorney licensed in the relevant state. Bring this workbook and any existing documents.

04 **Complete your documents**

Have your legal documents prepared or reviewed, then follow the applicable signing instructions.

05 **Review trust funding**

Discuss which assets need appropriate transfers. Listing an asset here does not fund a trust.

06 **Store and revisit**

Tell the appropriate trusted person where completed documents are stored. Review after major life changes.

Explore document preparation

Trust & Will is an independent provider. Confirm state eligibility, prices, and legal support directly. Louisiana residents: confirm trust availability before purchasing.

Explore trust plans at trustandwill.com