



GRANTOR AND BENEFICIARY INFORMATION

Grantor: The Grantor is:

- 1. Name: _____
- 2. Address: _____

- 3. Home Phone: _____ Email: _____

Beneficiary: The Beneficiary is

- 1. Name: _____
- 2. Address: _____

- 3. Home Phone: _____ Email: _____

Beneficiary's Representative: Conservator, Guardian, or Attorney-In-Fact:

- 1. Name: _____
- 2. Address: _____

- 3. Relation to Beneficiary: _____
- 4. Home Phone: _____ Work Phone: _____
- 5. Email: _____

Beneficiary's named heirs or intended beneficiaries upon the death of Beneficiary. Please check your election:

€ **Election 1** – Any remaining assets in the Beneficiary's sub-account are to be retained by the Trust and are to be used for the administration and care of other Beneficiaries under the Master Trust.

-OR-

€ **Election 2** - To Beneficiary's children in equal shares, by right of representation:

1. Name:

2. Address:

3. Relation to Beneficiary:

4. Phone:

Work Phone:

5. Email:

1. Name:

2. Address:

3. Relation to Beneficiary:

4. Phone:

Work Phone:

5. Email:

1. Name:

2. Address:

3. Relation to Beneficiary:

4. Phone:

Work Phone:

5.Email:

-OR-

€ Election 3 – Percentage of Trust to be distributed to the following beneficiaries:

Percentage of Trust to be distributed (%)	Name and Address of intended beneficiary

Initial Amount to be Transferred to Trust (the “Trust Funds”): \$ _____
(\$5,000.00 is the suggested minimum initial transfer)