STAPLETON ELDER LAW: DESIGN WORKSHEET

PLEASE PRINT YOUR <u>FULL LEGAL NAME</u> (AS THEY WILL APPEAR IN YOUR LEGAL DOCUMENTS).

LAST:	FIRST:		MIDDLE:			MAIDEN:			
LAST:	FIRST:		MIDDLE:			MAIDEN:			
TRUSTEE & BENEFICIARY INFORMATION: PLEASE PRINT AND USE FULL LEGAL NAMES									
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CLIENT PROV	IDE CURRENT OWNER DEED	DS?				ORDEF	R DEEDS	5?	
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GRANTEE(S)/	NAME OF TRUST:								
DATE OF TRU	ST:	TRUSTEE	:S:						
NOTES:									

■ BANK ACCOUNTS (CHECKING, SAVINGS, MONEY MARKET, CDS) ACCOUNT HOLDER(S) BANK/INSTITUTION ACCOUNT TYPE ACCOUNT #							
ACCOUNT IN	OLDER(3)	DAIN	/INSTITUTION	ACCOUNT TYPE	ACCOUNT #		
□ R/C SS	□ N/A	☐ APT	☐ RLT	☐ Beneficiary Prim:	Sec:		
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Commen	ts:						
Attorney/Staff	Notes:						

ACCOUNT HOLDER(S) BANK/INSTITUTION ACCOUNT TYPE ACCOUNT #	• RETIRE	MENT ACC	COUNTS (IRA	A, 401K, 403	RETIREMENT ACCOUNTS MAY NOT BE TRANSFERRED TO YOUR TRUST						
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Account Holder(s)											
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	SURANCE NT HOLDER(S	c)	PANK/	INSTITUTION	ACCOUNT TYPE	ACCOUNT #
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Attorney/	Staff Notes:					