***Charitable Remainder Trust QUESTIONNAIRE***

***RUSHFORTH Firm Ltd.***

***A Nevada Professional Limited-Liability Company***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Settlor(s) | | | |  | |
| ***NAME(S) OF CLIENT(S) / SIGNIFICANT OTHER*** | | | | ***MAILING ADDRESS*** | |
| **Full Name** *(as it appears on legal documents)*  [ ]-Not US citizen | | **Full Name** *(as it appears on legal documents)*  [ ]-Non-Client Significant Other [ ]-Not US citizen | |  | |
| **Name** *(as you want it in your documents)* | | **Name** *(as you want it in your documents)* | |
| **Birth Date** | | **Birth Date** | |
| **Social Sec. #** | | **Social Sec. #** | |
| Internet e-mail address: | Work Phone: | Internet e-mail address: | Work Phone: | Home Phone: | Fax: |

# Lead Beneficiaries

**.** (Name all beneficiaries who will receive distributions during the lead term of the trust. Attach additional sheets if necessary. Spell all names as you want them in the documents.)Please specify what happens to the share of a beneficiary who dies. (Does it go to the Charitable Beneficiaries or to other Lead Beneficiaries?)

| ***NAME*** | ***ADDRESS AND PHONE*** |
| --- | --- |
| [ ]-Check here if Settlor |  |
| [ ]-Check here if co-Settlor / Significant Other |  |
|  |  |

# Charitable BENEFICIARIES

**.** (Use additional pages if needed.)

| ***Name and Address***  ***(Specify Tax ID, chapter, branch, etc.)*** | ***Address And Phone*** | ***%*** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

# Trust Information

**.**

Name of Trust: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EFFECTIVE: [ ]-Now; or [ ]–After death. TYPE: [ ]-CRUT; [ ]-NIMCRUT; [ ]-FLIP NIMCRUT.

Payout rate: \_\_\_\_\_\_\_\_\_ (5% or more) Lead Term: [ ]-Lifetime; or [ ]-\_\_\_\_\_ years.

# Specific Provisions

. Check each provision that applies. (★Indicates the default provision if no selection is made.)

1. Who can remove and replace trustees and successor trustees?

[ ]-Settlor(s) may remove and replace the trustee and successor trustees.★

[ ]-Trust Protector may remove and replace the trustee and successor trustees [ ] only if the Settlor is (Settlors are) incapacitated.

1. Who can remove and the charitable beneficiaries?

[ ]-Settlor(s) may remove and replace the Charitable Beneficiaries.★

[ ]- After the lead term, the Trustee must designate one or more Charitable Beneficiaries if the named charities have ceased to exist or are not qualified charities (unless the Trust Protector has done so).★

[ ]- After the lead term, the Trust Protector may designate one or more Charitable Beneficiaries if the named charities have ceased to exist or are not qualified charities.

# Trustee and Advisers; Alternates

**.** (Include name, address, and phone.)

|  |  |  |  |
| --- | --- | --- | --- |
| ***CAPACITY*** | ***FIRST CHOICE*** | ***SECOND CHOICE*** | ***THIRD CHOICE*** |
| ***TRUSTEE.*** | [ ]-Check here if Settlor |  |  |
| ***Trust Protector.***  (*Optional*) |  |  |  |
| ***Investment Adviser.***  (*Optional*) |  |  |  |