

Data Collection Sheet Estate Planning and Gifting

Do you have a written will?	
When were you documents last updated?	
Do you have a Durable Power of Attorney?	
Do you have an Advanced Health Care Directive?	
Do you have a Living Will?	
Who is named Trusted Contact?	
Do you have a HIPAA directive?	

TRUSTS AND PARTNERSHIPS

QTIP

Assets held within the trust

Trust Name	Date Established	Income Beneficiary	Remainder Beneficiary	Rate of Return	Grantor	Asset #1	Asset #2	Asset #3	Asset #4	Asset #5
1)										
2)										
3)										

ILIT

Trust Name	Date Established	Income Beneficiary	Remainder Beneficiary	Term	Term expires at death of	Term		Payout Type	Annuity Amt	Payout Rate	Asset #1	Asset #2	Asset #3	Asset #4	Asset #5	
						(Fixed amt, %, income)	(For fixed amt payout) (% income)									
1)																
2)																
3)																

FLP

Trust Payout

Gifting

Trust Name	Date Established	Owner	Default Investmt	Discount Rate%	Start Year	End Year	Gift Recipient	Gift Amount	Gift Exclusion	Start Year	End Year	Asset #1	Asset #2	Asset #3	Asset #4	Asset #5
1)																
2)																
3)																

QPRT

Trust Name	Date Established	Grantor	Residence	Retained Interest	Remainder Interest	Remainder Beneficiary	Term	(yes/no) w/Reversion
1)								
2)								
3)								

GRT

Trust Name	Date Established	Income Interest	Remainder Interest	Grantor	Income Benef.	Remainder Benef.	Term	Term expires at death of	Term		Payout Type	Annuity Amt	Payout Rate	With Reversion	Investmt Rate	Asset #1	Asset #2	Asset #3	Asset #4	Asset #5	
									(Fixed amt, %)	(For fixed amt payout) (yes/no)											
1)																					
2)																					
3)																					

Data Collection Sheet Estate Planning and Gifting

CRT/CLT

Trust Name	Date Established	Income Interest	Remainder Interest	Grantor	Income Benef.	Remainder Benef.	Term	Term expires at death of	(Fixed amt,%)	(For fixed amt payout)	(For % payout type)	Investmt Rate	Asset #1	Asset #2	Asset #3	Asset #4	Asset #5
									Payout Type	Annuity Amt	Payout Rate						
1)																	
2)																	
3)																	
4)																	
5)																	

CST

Trust Name	Income Benef.	Remainder Benef.	Grantor	Investmt Rate	Term	Term (# yrs)	Term expires at death of	(Fixed amt,%, income)	(For fixed amt payout)	(%, income)	Asset #1	Asset #2	Asset #3	Asset #4	Asset #5
								Payout Type	Annuity Amt	Payout Rate					
1)															
2)															
3)															
4)															
5)															

REVOCABLE TRUST

Trust Name	Date Established	Grantor
1)		
2)		
3)		
4)		
5)		

IRREVOCABLE TRUST

Trust Name	Date Established	Income Benef.	Remainder Benef.	Investmt Rate	Term	Term expires at death of	(Fixed amt,%, income)	(For fixed amt payout)	(%, income)	(yes/no)
							Payout Type	Annuity Amt	Payout Rate	Crummey Powers?
1)										
2)										
3)										
4)										
5)										

GIFTING

Gift Name	\$ amt gift or % of an asset	or amount	% of asset	from which asset?	Investmt Rate	Grantor	Recipient	Exclusion Amt	Start Year	End Year
1)										
2)										
3)										
4)										
5)										