KATRINA N. HOFSTETTER, ATTORNEY AT LAW
KATRINA@CORNERSTONELEGALPLLC.COM
KRISTIN M. RIOS, ATTORNEY AT LAW
KRISTIN@CORNERSTONELEGALPLLC.COM

109 E. KNIGHT STREET, EATON RAPIDS, MI 48827
T: 517-708-2222
F: 517-709-7312

Personal Information – Decedent Trustmaker

Name:	
Address, City, State, ZIP, County:	
Date of Birth:	SSN:
Date of Death:	

Personal Information - Client

Name:	
Address, City, State, ZIP:	
Home Phone:	Cell Phone:
Email:	

Surviving Spouse – Decedent Trustmaker

Name:	
Address, City, State, ZIP:	
Home Phone:	Date of Marriage:

Trust Information

Date:	Amendment Date:
Successor Trustee Name:	Do you have the original?

Beneficiary Information

Name:	Name:
Address:	Address:
City, State, ZIP:	City, State, ZIP:
Name:	Name:
Address:	Address:
City, State, ZIP:	City, State, ZIP:
Name:	Name:
Address:	Address:
City, State, ZIP:	City, State, ZIP:
Name:	Name:
Address:	Address:
City, State, ZIP:	City, State, ZIP:

Asset Information

Asset Description:	Asset Description:
Value:	Value:
Account Number (if applicable):	Account Number (if applicable):
Owner(s):	Owner(s):
Beneficiary (if applicable):	Beneficiary (if applicable):
Asset Description:	Asset Description:
Value:	Value:
Account Number (if applicable):	Account Number (if applicable):
Owner(s):	Owner(s):
Beneficiary (if applicable):	Beneficiary (if applicable):
Asset Description:	Asset Description:
Value:	Value:
Account Number (if applicable):	Account Number (if applicable):
Owner(s):	Owner(s):
Beneficiary (if applicable):	Beneficiary (if applicable):
Asset Description:	Asset Description:
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Beneficiary (if applicable):	Beneficiary (if applicable):