

PERSONAL DATA

PRIVATE TRUST DATA FORM

You Full Name	
Phone Number	
Date of Birth	
Spouse	
Full Name	
Employer	
Home Phone	Work Phone
Date of Birth	
CHILDREN	
Full Name	Date of Birth
1	
2	
3	-
DIVORCE	
Have you had any marriage	hich ended in divorce?
If yes, when was the divorce	
Please supply a copy of you	divorce order and any financial orders if you have these available.

ESTATE DATA				
Location and Type of P	roperty How Title is Reg	istered¹	Present Value ²	
SHARES/STOCKS Company	Volume/Value		SCS No.	
				-
				-
				-
LIFE INSURANCE				
Company	Type of Policy* Owner	Beneficiary	Face Value	
EMPLOYEE BENEFI PENSION-You				
1. Are you covered in a	qualified pension plan?] yes 🗌 no		
2. What is your RSA Nu	mber?			

 $^{^{1}}$ Such as individual name, jointly owned, etc. 2 Do not deduct mortgage here

^{*} Term, Whole life, etc.

	imes and addresses of first and second choices for trustee rporate trustee	2. You may name an individual or		
	Name			
	Relationship to you			
	Address			
2.	Name			
	Relationship to you			
	Address			
	STRIBUTION OF ESTATE			
PΙθ	ease indicate, by checking the appropriate option, how yo	u want your assets to pass when you die.		
• † • If • If	otion A: I want my assets to pass to my spouse and childre To spouse, if surviving. If my spouse predeceases me, my assets will be divided in If any of my children predecease me, that child's share sha In the event my spouse and all of my children and descend lows:	equal shares among my children. Ill be distributed to his or her children in equal shares.		
AS	SET	BENEFICIARY		
				
• li • li eq	Option B: I am unmarried with children and want my assets to pass: In equal shares to my children. If one or more of my children predeceases me, that child's share in my estate is distributed to his or her children in equal shares. In the event all my children and descendants fail to survive me, I want my assets to be distributed as follows:			
AS	SET	BENEFICIARY		

Trustee(s)/Executors

ASSET		BENEFICIAR	PY	
		BEITEITEIT		
Option D : None of the above. In	want my assets to pas	ss in this manner:		
SSET		BENEFICIAR	2Y	
ist percentages:% at	_years old;% at _	ted to your children/ years old;9	6 at years old:	
ist percentages:% at	monies to be distribu years old;% at _ AGE	ted to your children/ years old;9	beneficiaries? 6 at years old: PERCENTAGE	
ist percentages:% at	_years old;% at _	ted to your children/ years old;9	6 at years old:	
st percentages:% at	_years old;% at _	ted to your children/ years old;9	6 at years old:	
st percentages:% at	_years old;% at _	ted to your children/ years old;9	6 at years old:	
st percentages:% at	_years old;% at _	ted to your children/ years old;9	6 at years old:	
st percentages:% at	_years old;% at _	ted to your children/ years old;9	6 at years old:	
st percentages:% at	_years old;% at _	ted to your children/ years old;9	6 at years old:	
st percentages:% at	_years old;% at _	ted to your children/9	6 at years old:	
st percentages:% at	_years old;% at _	ted to your children/ years old;9	6 at years old:	
ist percentages:% at	_years old;% at _	ted to your children/ years old;9	6 at years old:	
At what age(s) do you want the ist percentages:% at	_years old;% at _	ted to your children/9	6 at years old:	
.ist percentages:% at	_years old;% at _	ted to your children/	6 at years old:	
ist percentages:% at	_years old;% at _	ted to your children/9	6 at years old:	
ist percentages:% at	_years old;% at _	ted to your children/9	6 at years old:	

List any instructions regarding limitations on distributions (such as completion of University Education, etc.), or special situations (such as starting a business, getting married, etc.).
Do you wish to disinherit any child, grandchild, or other person? If yes, you must list their names here.
Is there anyone who you think might have a claim on your estate whom you do not want to benefit from your Will?
If you propose to leave a legacy to someone who is married into your family e.g. a son in law, do you still wish them to benefit if they divorce?
Do you want a will contest clause (beneficiary gets nothing if he/she contests will or gift)?
If your children are under age eighteen (18), state the full name, address, and relationship (if any) of the person you wish to act as their guardian (custody) in the event of your death (in the case of a single parent) or in case of the joint death of you and your spouse (if married). You should obtain the consent of the person(s) before executing your Will.
NOTE: A guardian is a person lawfully invested with the power, and charged with the duty, of taking care of the person who is incapable of doing so because of age or other incapacity.
GUARDIAN(S)
a. Name(s):
b. Address:
c. City:
d. State:
e. Relationship (if any):

SUCCESSOR GUARDIAN(S)
. Name(s):
o. Address:
. City:
l. State:
. Relationship (if any):
fyou want the guardian to receive a stipend/compensation for taking on the responsibilities of guardian, please set orth the details (e.g. monthly, annually etc.).
hereby undertake and declare that all the statements made above and overleaf are true and correct and that I have not withheld any material information. I also agree to give notice to CSL TRUSTEES LIMITED in the event of any hange in the information given.
Name:
signature:
Date:
Special Requests:

If the person or entity listed above is unwilling or unable to serve as guardian, please list an alternate: