

# Living Trust Form Template

## 1. Trust Creation Information

This document is a Revocable Living Trust created by \_\_\_\_\_  
(Grantor), on the \_\_\_\_ day of \_\_\_\_\_, 20. The Trust will be referred to as the  
\_\_\_\_\_ Trust.

Grantor Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_

## 2. Trustee and Successor Trustee

Trustee Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Successor Trustee Name: \_\_\_\_\_

## 3. Trust Assets

The following property will be transferred into the Trust:

- Real Property (Home/Investment Property):

\_\_\_\_\_

- Bank Accounts: \_\_\_\_\_

- Investments: \_\_\_\_\_

- Personal Property: \_\_\_\_\_

#### 4. Beneficiaries and Asset Distribution

Upon the death of the Grantor, the assets will be distributed as follows:

- Beneficiary #1: \_\_\_\_\_  
Relationship: \_\_\_\_\_  
Share: \_\_\_\_\_%
- Beneficiary #2: \_\_\_\_\_  
Relationship: \_\_\_\_\_  
Share: \_\_\_\_\_%

#### 5. Grantor's Rights

The Grantor retains the right to amend, revoke, or alter this Trust during their lifetime.

Grantor Signature: \_\_\_\_\_

Trustee Signature: \_\_\_\_\_

Date: \_\_\_\_\_