Revocable Living Trust Planning Worksheet

Free printable planning worksheet • NOT a legal document or software-generated form

Trust planning overview

Client or matter reference

Applicable state / type of trust contemplated

Fiduciaries

Settlor(s) and initial trustee(s)

Successor trustee and alternate(s)

Funding considerations

Property or accounts to review for potential trust funding

Existing deed, title and beneficiary designations to check

Distributions

Current and remainder beneficiaries

Distribution ages, timing, conditions or special needs

Attorney review

Changes or restrictions to consider

Follow-up information or documents requested

Use for discussion and internal intake only. This worksheet does not create, replace or execute a will, trust, power of attorney or advance directive. Verify all content and signing requirements under applicable state law.