



Katrina N. Hofstetter

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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):
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