MANGRUM & MANGRUM, LLC
Attorneys at Law | 4842 LaVista Road | Tucker, Georgia 30084-4464

Telephone: (770) 496-1600 | Facsimile: (770) 559-0727 | Email: Contact@Mangrum-Law.com

REVOCABLE LIVING TRUST QUESTIONNAIRE

CONFIDENTIAL

How to Use This Questionnaire
Please answer what you can. Estimates are acceptable unless a precise figure is requested. Write "unknown" or "to be discussed" rather than leaving an important question blank.

This questionnaire identifies your planning goals and the assets that may need coordination. It does not transfer ownership of any asset.

After the documents are signed, some assets may require a deed, change-of-ownership form, new account registration, or beneficiary-designation form. Banks, brokerage firms, insurers, and retirement-plan custodians control their own procedures and may require separate paperwork.

A. CLIENT INFORMATION

Provide the information exactly as it appears on your identification and existing legal documents.

1. Full Legal Name _____

2. Other Names Used (maiden name, prior married name, aliases) _____

3. Date of Birth _____

4. Last Four Digits of Social Security Number _____

5. Home Address _____

6. Email Address _____

7. Primary Telephone Number _____

8. Occupation / Employer _____

B. MARITAL AND FAMILY INFORMATION

List every child, including adult children, deceased children, adopted children, and children from prior relationships.

9. Marital Status _____

☐ Single ☐ Married ☐ Divorced ☐ Widowed ☐ Domestic Partnership

10. Spouse's Full Legal Name _____

11. Spouse's Date of Birth _____

12. Last Four Digits of Spouse's Social Security Number _____

13. Intended Trust Structure: ☐ Joint Trust ☐ Separate Trusts ☐ Unsure / Please Advise

14. Children and Other Descendants

Full Legal Name	Date of Birth	Relationship / Parent	Current Address	Special Circumstances?

Full Legal Name	Date of Birth	Relationship / Parent	Current Address	Special Circumstances?

C. TRUST ADMINISTRATION

The initial trustee usually manages the trust during life. A successor trustee acts if the initial trustee dies, resigns, or becomes unable to serve.

15. Proposed Name of Trust (default: "[Client/Family Name] Revocable Living Trust") _____

16. Initial Trustee(s): ☐ You ☐ You and Spouse Jointly ☐ Other: _____

17. Successor Trustee(s), in order of preference

Order	Full Legal Name	Address	Relationship	Telephone / Email

18. Trustee Compensation: ☐ No compensation ☐ Reasonable compensation ☐ Discuss with attorney

D. DISTRIBUTION AT DEATH

Describe the result you want, not legal terminology. We will recommend the structure needed to carry it out.

19. At the first death, how should the trust property be handled?

☐ All to surviving spouse

☐ Some property to surviving spouse and some to other beneficiaries

☐ Continue in trust for surviving spouse

☐ Other / Unsure (explain below)

First-death instructions, questions, or concerns:

_____

_____

_____

20. After the death of the surviving spouse, or at your death if unmarried, who should receive the remaining property?

Beneficiary	Relationship	Share / Gift	Outright or Held in Trust?	Age or Condition for Distribution

21. Does any beneficiary need additional protection? ☐ No ☐ Yes ☐ Unsure

Consider disability or public benefits, creditor problems, divorce risk, substance abuse, financial immaturity, or a desire to preserve assets for descendants.

Explanation / Questions:

_____
_____
_____

22. Specific Gifts

Description of Gift	Recipient	Relationship	Alternate Recipient if First Recipient Predeceases

Description of Gift	Recipient	Relationship	Alternate Recipient if First Recipient Predeceases

Questions, Uncertainties, or Suggestions About Distribution
Use this space to explain anything you are unsure about, identify competing options, or ask us to recommend an appropriate structure.

E. ASSETS AND TRUST FUNDING

This section helps us identify assets that may need a deed, account retitling, or beneficiary-designation review. Do not move or retitle assets until we have reviewed the plan with you.

Important Funding Expectations

Real estate: Real estate is ordinarily transferred to the trust by a separately prepared and recorded deed. A mortgage does not usually prevent transfer, but the deed, title, insurance, lender requirements, and any homestead or tax consequences must be reviewed.

Checking, savings, money-market, and nonretirement brokerage accounts: These accounts may be retitled in the name of the trustee, or in some cases coordinated through payable-on-death or transfer-on-death designations. The institution generally requires its own forms and may open a new trust registration rather than simply changing the name on an existing account.

Retirement accounts: IRAs, 401(k)s, 403(b)s, pensions, and similar retirement accounts ordinarily remain in the participant's individual name. Transferring ownership to a revocable trust during life can be treated as a taxable distribution or may not be permitted. We coordinate these assets through beneficiary designations and determine whether an individual or the trust should be named as beneficiary based on tax, creditor-protection, special-needs, and distribution objectives.

Motor vehicles: Motor vehicles are not included in this questionnaire because they are not ordinarily retitled to a revocable trust. Retitling can complicate insurance, financing, registration, and routine sale or replacement, while the probate-avoidance benefit is often limited. A vehicle can be addressed by title planning, beneficiary designation where available, a pour-over will, or later trust funding when special circumstances justify it.

Funding work: Unless the engagement agreement expressly states otherwise, preparation of the trust does not include completing every bank, brokerage, retirement, insurance, or business transfer form. We will identify recommended funding steps and can assist with additional implementation as agreed.

23. Real Estate

Property Address	County / State	Current Titled Owner(s)	Approx. Value	Mortgage / Lender

Please provide a copy of the current recorded deed and the most recent mortgage statement, if any.

24. Bank and Nonretirement Investment Accounts

Do not list retirement accounts in this table. Instead, provide recent retirement-account statements and current beneficiary designations with your supporting documents.

Institution	Account Type	Current Owner(s)	Approx. Balance	Current POD / TOD Beneficiary

25. Life Insurance and Annuities

Company	Insured / Owner	Current Beneficiary	Approx. Death Benefit	Policy Type

26. Business Interests

Entity Name	Entity Type / State	Ownership %	Co-Owners	Operating / Shareholder Agreement?

27. Other Significant Assets

Examples: valuable tangible property, mineral rights, intellectual property, digital assets, promissory notes, expected inheritances, or assets located outside Georgia.

Asset Description	Current Owner	Approx. Value	Location / Institution	Special Instructions or Concerns

F. POUR-OVER WILL AND SUPPORTING DOCUMENTS

A revocable trust is normally part of a coordinated estate plan. The following documents address assets outside the trust, incapacity, healthcare decisions, and minor children.

28. Primary Guardian for Minor Children _____

29. Alternate Guardian for Minor Children _____

30. Advance Directive for Healthcare: ☐ Prepare ☐ Already Have ☐ Discuss

Primary Healthcare Agent _____

Address / Telephone / Email _____

Alternate Healthcare Agent _____

Address / Telephone / Email _____

31. Durable Financial Power of Attorney: ☐ Prepare ☐ Already Have ☐ Discuss

Primary Financial Agent _____

Address / Telephone / Email _____

Alternate Financial Agent _____

Address / Telephone / Email _____

G. ADDITIONAL PLANNING INFORMATION

These questions help identify issues requiring special drafting or further advice.

32. Do you want a clause intended to discourage a beneficiary from challenging the plan? ☐ Yes ☐ No ☐ Discuss

33. Are there recent or expected changes involving marriage, divorce, birth, adoption, death, disability, relocation, business ownership, litigation, or a substantial inheritance?

Explanation / Questions:

_____

_____

_____

34. Existing Estate-Planning Documents: ☐ None ☐ Will ☐ Trust ☐ Power of Attorney ☐ Advance Directive ☐ Other

Please provide complete copies, including all amendments and signature pages.

35. Other Instructions, Family Circumstances, or Concerns

_____

_____

_____

H. DOCUMENTS TO PROVIDE

Please provide copies, not originals, unless requested. Recent statements may be redacted to show only the last four digits of account numbers.

☐ Current deeds for all real estate

☐ Recent statements for bank, brokerage, and retirement accounts

☐ Current beneficiary designations for retirement accounts, life insurance, annuities, and transfer-on-death accounts

☐ Life-insurance and annuity policy summaries

☐ Business formation documents and any operating, partnership, buy-sell, or shareholder agreements

☐ Existing wills, trusts, amendments, powers of attorney, and advance directives

☐ Prenuptial, postnuptial, divorce, property-settlement, or support agreements that may affect the plan

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Client Acknowledgment
I understand that this questionnaire is used to gather preliminary information; it is not legal advice, a final estate plan, or an asset-transfer document. I will review the recommended funding steps and notify the firm of material changes before signing.

Client Signature: _____ Date: _____

Spouse / Co-Client Signature: _____ Date: _____

NOTES