Leave No Blank Spaces	LIVING TRUST APPLICATION Mail completed application to: Heritage Living Trust P.O. Box 66972 Scotts Valley, CA 95067	Allow Up To 45 Days For Trust Preparation		
	BE PRECISE, LEGIBLE AND LEAVE NO BLANK SPACES			
l am a U.S. Citizen (Yes or N	No): Spouse is a U.S. Citizen (Y	′es, No):		
Husband Name:	e: Jr., Sr., Other, or N/A:			
Husband Date of Birth:	Husband Social Security Number:			
Wife Name:				
	Wife Social Security Number:			
Address:	City: Stat	te: Zip:		
Marital Status:	County of Residence:			
Phone:	Approximate Value of Estate: (Under \$5			
Email Address:	(Under \$5 eded for changes, updates and funding)	Million/\$5M-\$10M/Over \$10M)		
All children must be listed rega	Total Number of Children: If you have no children write "0" in the box above. Irdless of age and regardless of whether or not each child ildren, and who is the biological parent of each of uses/A=Adopted)	-		
	(H/W/B/A)	(H/W/B/A)		
	(H/W/B/A)	(H/W/B/A)		
(If more space is ne	(H/W/B/A) eeded, please use the blank space provided on page 5 of	(H/W/B/A) (H/W/B/A)		
	Guardians of Minor Children u have no minor children, write "N/A" on the first line below mmend that two persons be named, in case one cannot s			
Guardian #1 Name:	Jr., Sr., Othe	er, or N/A:		
Guardian #2 Name:	Jr., Sr., Othe	er, or N/A:		
How shall the Guardians serve?:				

"Jointly" (Together) Or "In succession" (In the order listed above)

	Name of person(s) chosen by c We recommend that				pouse.
Successo	r #1 Name:		Jr., Sr., Oth	ner, or N	/A:
Address: _		City:	Stat	te:	_Zip:
Phone Nur	nber:	County of Resid	ence:		
Successo	r #2 Name:		Jr., Sr., Otł	ner, or N	/A:
Address: _		City:	Stat	te:	_Zip:
Phone Nur	nber:	County of Resid	ence:		
(If there	How shall the Success " <u>Jointly</u> " (Together) are more than 2 Successor Trus	or "In Succession	" (In the order listed		
			Beneficiaries listed belo		nounts.
#1 Name _			_\$ Amount or %		_
#2 Name _	(If not applicable, writ	e "N/A")	_ \$ Amount or %		_
#3 Name _	(If not applicable, writ		_ \$ Amount or %		
#4 Name _	(If not applicable, writ	e "N/A")	_ \$ Amount or %		_
#5 Name _	(If not applicable, writ	e "N/A")	_ \$ Amount or %		_
#6 Name _	(If not applicable, writ	e "N/A")	_ \$ Amount or %		_
	(If not applicable, writ		_ \$ Amount or %		
#8 Name _	(If not applicable, writ	e "N/A")	_\$ Amount or %		_
Age for beneficiary(s) to receive inheritance "At Death"/"Or Age"/"Or Other": "At Death" means the beneficiary will receive his inheritance immediately after the client passes. "Or Age" means the age the client designates each beneficiary to receive his inheritance. "Or Other" means any arrangements for distribution other than "At Death" and "Or Other". For minors, the trust defaults to age 21 unless otherwise stated by client. (If more space is needed, please use the blank page provided on page 5 of this application)					

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Nam	ne of person(s) chosen by client to step regarding client's permanent care, in t	rnates For Husband in at client's incompetence to make decisions he event the client's spouse is unable to. be named, in case one cannot serve.	
Conservator #1	Name:	Jr., Sr., Other, or N/A:	
Conservator #2	Name:	Jr., Sr., Other, or N/A:	
How	shall the Conservator Alterna " <u>Jointly</u> " (Together) Or " <u>In succ</u>	tes serve?: cession" (In the order listed above)	
Nam	ne of person(s) chosen by client to step regarding client's permanent care, in t	ternates For Wife in at client's incompetence to make decisions he event the client's spouse is unable to. be named, in case one cannot serve.	
Conservator #1	Name:	Jr., Sr., Other, or N/A:	
Conservator #2	Name:	Jr., Sr., Other, or N/A:	
How shall the Conservator Alternates serve?: " <u>Jointly</u> " (Together) or " <u>In Succession</u> " (In the order listed above)			
	Healthcare Power of Attor Name of person(s) chosen by cl to make health care decisions in the	ney Alternates For Husband lient to step in at client's incapacity event the client's spouse is unable to. be named, in case one cannot serve.	
Healthcare POA	Healthcare Power of Attor Name of person(s) chosen by cl to make health care decisions in the We recommend that two persons	ney Alternates For Husband lient to step in at client's incapacity e event the client's spouse is unable to.	
	Healthcare Power of Attor Name of person(s) chosen by cl to make health care decisions in the We recommend that two persons l #1 Name:	ney Alternates For Husband lient to step in at client's incapacity e event the client's spouse is unable to. be named, in case one cannot serve.	
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Healthcare POA	Healthcare Power of Attor Name of person(s) chosen by cl to make health care decisions in the We recommend that two persons l #1 Name: #2 Name: #2 Name: hall the Healthcare POA Alterr "Jointly" (Together) or "In Succ Healthcare Power of Att Name of person(s) chosen by cl to make health care decisions in the	ney Alternates For Husband lient to step in at client's incapacity e event the client's spouse is unable to. be named, in case one cannot serve. Jr., Sr., Other, or N/A: Jr., Sr., Other, or N/A:	
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Asset Power of Attorney Alternates For Husband Name of person(s) chosen by client to step in at client's incapacity or incompetence to conduct financial business on behalf of client (such as banking, etc.) in the event the client's spouse is unable to. We recommend that two persons be named, in case one cannot serve.			
Asset POA	#1 Name:	Jr., Sr., Other, or N/A:	
Asset POA	#2 Name:	Jr., Sr., Other, or N/A:	
How shall the Asset POA Alternates serve?: " <u>Jointly</u> " (Together) or " <u>In Succession</u> " (In the order listed above)			
Asset Power of Attorney Alternates For Wife Name of person(s) chosen by client to step in at client's incapacity or incompetence to conduct financial business on behalf of client (such as banking, etc.) in the event the client's spouse is unable to. We recommend that two persons be named, in case one cannot serve.			
Asset POA	#1 Name:	Jr., Sr., Other, or N/A:	
Asset POA	#2 Name:	Jr., Sr., Other, or N/A:	
How shall the Asset POA Alternates serve?: " <u>Jointly</u> " (Together) or " <u>In Succession</u> " (In the order listed above)			
We have agreed to purchase Revocable Living Trust documents through Heritage Living Trust and its Independent Professional Associate.			

We understand that any requested changes or revisions of the Trust will be done by Heritage Trust at NO CHARGE.

We understand that we have 72 hours from the signing of this contract to CANCEL this agreement. We understand that no refunds will be made after 72 hours from the time we signed this Application. CLIENT INITIAL

We have read and understand this Living Trust Application.

We understand that it is our sole responsibility to properly execute all documents and transfer all of our assets and property into our Living Trust. And, if we fail to make the transfers into our Living Trust, our property may be subject to Probate through no fault of Heritage Living Trust or the Independent Professional Representative.

We have reviewed the information provided in the application and we understand and agree that only the information provided by us to Heritage Living Trust and the Independent Professional Representative will be used in the preparation of all documents. We hereby attest to the accuracy of the information provided on this data form.

Date of Application: _____

Applicant Signature X _____

Applicant Spouse Signature X

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Additional Instructions			

Applicant Authorization To Create Trust

We agree to purchase Revocable Living Trust documents from Heritage Living Trust. We do understand that Heritage Living Trust is a document preparation and publishing company. We understand that Heritage Living Trust is not a law firm and has not rendered any legal advice regarding my purchase of Living Trust documents. We understand and authorize the Independent Professional Representative to provide a copy of all information taken from us to Heritage Living Trust for the sole purpose of creating our Living Trust documents. We understand that Heritage Living Trust does not engage in the sale of insurance-related products, securities or other investments and we have not been asked by Heritage Living Trust to purchase such products. We understand that although all necessary documents are provided in our Heritage Living Trust, we may optionally elect to have a local attorney of our choice review said Living Trust documents, the cost for which we will be solely and separately responsible. We understand that if additional legal services are required for transferring assets into our Trust, separate and additional legal fees may be charged by the attorney we select. We hereby authorize Heritage Living Trust, its employees and/or associates to release confidential information pertaining to our estate to the attorney selected by us should we elect this option. Heritage Living Trust and the Independent Professional Representative shall keep private and confidential all data provided by us on this application. Such information is confidential and shall not be released to any third party without our expressed written permission and authorization.

Receipt

WE UNDERSTAND THAT HERITAGE LIVING TRUST AND THE INDEPENDENT PROFESSIONAL REPRESENTATIVE ARE NOT ATTORNEYS. WE FURTHER UNDERSTAND THAT EVERY EFFORT IS MADE TO ENSURE THE ACCURACY OF THESE TRUST DOCUMENTS BASED UPON THE INFORMATION THAT WE HAVE PROVIDED TO HERITAGE LIVING TRUST AND THE INDEPENDENT PROFESSIONAL REPRESENTATIVE. IF WE ELECT TO HAVE AN ATTORNEY REVIEW OUR TRUST DOCUMENTS, HERITAGE LIVING TRUST WILL MAKE ANY AND ALL CHANGES SUGGESTED BY THAT ATTORNEY. THESE CHANGES MUST BE REQUESTED IN WRITING AND SENT TO HERITAGE LIVING TRUST AT P.O. BOX 66972, SCOTTS VALLEY, CA 95067. WE UNDERSTAND THE CHANGES WILL BE DONE AT NO CHARGE BY HERITAGE LIVING TRUST. WE UNDERSTAND THAT HERITAGE LIVING TRUST IS NOT A LAW FIRM, BUT RATHER A QUALFIED LEGAL DOCUMENT PUBLISHING COMPANY. HERITAGE LIVING TRUST AND THE INDEPENDENT PROFESSIONAL REPRESENTATIVE EMPHASIZE THE IMPORTANCE OF CONSULTING EXPERIENCED AND QUALIFIED ACCOUNTING, ESTATE PLANNING AND/OR FINANCIAL CONSULTANTS/ADVISORS, TO ASSURE THE BEST RESULTS FROM OUR REVOCABLE LIVING TRUST DOCUMENTS.

WE AUTHORIZE HERITAGE LIVING TRUST TO USE THIS DATA TO PROVIDE INFORMATION AND REMINDERS REGARDING THE FUNDING OF OUR LIVING TRUST AND PROVIDE, FROM TIME TO TIME, FUTURE ESTATE PLANNING AND ASSET PROTECTION INFORMATION. WE UNDERSTAND THAT WE ARE NOT OBLIGATED IN ANY WAY TO PURCHASE ANY FUTURE FINANCIAL OR INSURANCE SERVICES.

Received for a Living Trust \$	on this	day of	,	20
Trust Purchased: "AB"/"QTIP"/"QDOT":		Special Needs Provision (\$1	00 additional) Ye	es or No:
X Applicant Signature	Date	X Applicant Spouse Signature)	Date
X Independent Professional Representative N	lame	Representative Phone	Representative	Email