

# CHARITABLE REMAINDER TRUST QUESTIONNAIRE

## RUSHFORTH FIRM LTD.

A Nevada Professional Limited-Liability Company

**1. SETTLOR(S)**

NAME(S) OF CLIENT(S) / SIGNIFICANT OTHER				MAILING ADDRESS	
Full Name (as it appears on legal documents)  <div style="text-align: right;"><input type="checkbox"/> -Not US citizen</div>		Full Name (as it appears on legal documents)  <div style="text-align: right;"><input type="checkbox"/> -Non-Client Significant Other    <input type="checkbox"/> -Not US citizen</div>			
Name (as you want it in your documents)		Name (as you want it in your documents)			
Birth Date		Birth Date			
Social Sec. #		Social Sec. #			
Internet e-mail address:	Work Phone:	Internet e-mail address:	Work Phone:	Home Phone:	Fax:

**2. LEAD BENEFICIARIES.** (Name all beneficiaries who will receive distributions during the lead term of the trust. Attach additional sheets if necessary. Spell all names as you want them in the documents.) Please specify what happens to the share of a beneficiary who dies. (Does it go to the Charitable Beneficiaries or to other Lead Beneficiaries?)

NAME	ADDRESS AND PHONE
<input type="checkbox"/> -Check here if Settlor	
<input type="checkbox"/> -Check here if co-Settlor / Significant Other	

**3. CHARITABLE BENEFICIARIES.** (Use additional pages if needed.)

NAME AND ADDRESS (Specify Tax ID, chapter, branch, etc.)	ADDRESS AND PHONE	%

**4. TRUST INFORMATION.**

Name of Trust: \_\_\_\_\_

EFFECTIVE: -Now; or -After death.      TYPE: -CRUT; -NIMCRUT; -FLIP NIMCRUT.

Payout rate: \_\_\_\_\_ (5% or more)      Lead Term: -Lifetime; or -\_\_\_\_\_ years.

**5. SPECIFIC PROVISIONS.** Check each provision that applies. (★ Indicates the default provision if no selection is made.)

a. Who can remove and replace trustees and successor trustees?

-Settlor(s) may remove and replace the trustee and successor trustees. ★

-Trust Protector may remove and replace the trustee and successor trustees  only if the Settlor is (Settlors are) incapacitated.

b. Who can remove and the charitable beneficiaries?

-Settlor(s) may remove and replace the Charitable Beneficiaries. ★

- After the lead term, the Trustee must designate one or more Charitable Beneficiaries if the named charities have ceased to exist or are not qualified charities (unless the Trust Protector has done so). ★

- After the lead term, the Trust Protector may designate one or more Charitable Beneficiaries if the named charities have ceased to exist or are not qualified charities.

**6. TRUSTEE AND ADVISERS; ALTERNATES.** (Include name, address, and phone.)

CAPACITY	FIRST CHOICE	SECOND CHOICE	THIRD CHOICE
<b>TRUSTEE.</b>	<input type="checkbox"/> -Check here if Settlor		
<b>TRUST PROTECTOR.</b> (Optional)			
<b>INVESTMENT ADVISER.</b> (Optional)			