

WORKSHEET ONLY!

Use this form to collect all the information you need, then return to the website and complete the online trust application. This is NOT a trust application!

Henderson Trust Application Worksheet (with Mail Forwarding)

Please print this page and use it to collect the data you need to create a trust. One you have completed this printed form, you are now ready to complete the online application. **Do NOT send us this worksheet!**

TRUST TITLE

NAME OF TRUST: *

CREATION/EIN DATE: *

Enter the date your trust was created, if not today (MMDD/YY)

SETTLORS & OFFICERS

As the person applying for and establishing a trust, you are called the trust Settlor. Two people, such as husband and wife, may be joint settlors, with each settlor having equal rights. This is called a Dual Settlor Trust.

SETTLOR (1) FIRST: * MIDDLE: LAST: *

ONLY ENTER SECOND SETTLOR IF YOU ARE CREATING A DUAL SETTLOR TRUST

SETTLOR (2) FIRST: MIDDLE: LAST:

TRUSTEE (1) FIRST: * MIDDLE: LAST: *

TRUSTEE (2) FIRST: * MIDDLE: LAST: *

SPECIAL POWER OF APPOINTMENT TRUSTEE FIRST: * MIDDLE: LAST: *

The Special Power of Appointment Trustee's sole purpose is to appoint a new trustee in the event that an existing trustee vacates the position or dies. TJ Henderson is willing to assume this role initially, but you are welcome to assign someone else if you so choose.

PROTECTOR TRUSTEE FIRST: * MIDDLE: LAST: *

The Protector Trustee helps interpret the trust for the trustees, appoint trustees as needed, and modify the trust in keeping with the law. TJ Henderson is willing to serve as your initial trust protector, or you can assign someone else if you so choose.

EXEC. DIRECTOR (SETTLOR): * MIDDLE: LAST: *
FIRST:

EXEC. SECRETARY FIRST: * MIDDLE: LAST: *

THE EXEC. SECRETARY IS NORMALLY THE SECOND SETTLOR IN THE CASE OF A DUAL SETTLOR TRUST. IN THE CASE OF A SINGLE SETTLOR TRUST THE EXEC. SECRETARY IS NORMALLY THE SETTLOR.

BENEFICIARIES

BENEFICIARY (IES): (*SUGGESTED: **ONE INDIVIDUAL ONLY** IF DOING A & B TRUST SYSTEM)

*BENEFICIARY (1) FIRST: * MIDDLE: LAST: *

*BENEFICIARY (2) FIRST: MIDDLE: LAST:

*BENEFICIARY (3) FIRST: MIDDLE: LAST:

ASSETS

LIST OF ASSETS TO TRANSFER INTO TRUST: (ALL OR SOME IQD, VND, GOLD, HOME, AUTOS, ETC.)

Asset #1:

Asset #1:

Asset #2:

Asset #3:

Asset #4:

Asset #5:

Asset #6:

TRUST ADDRESS

We will assign a mail forwarding address for your trust. This address will be used as your Trust's official address in your trust, EIN application, and bank account application.

MAIL FORWARDING

You have requested that we set up a Nevada mail forwarding address for you. We will set up mail forwarding for your trust with Nevada Mail Service in Sparks, Nevada. Your payment of \$75 for mail forwarding service will be applied as follows: \$29.97 forwarding address rental for three months, plus \$20.03 for postage and handling, and \$25 for Henderson Trust Group to set up the mail forwarding account. Along with your trust document we will provide you with the necessary paperwork to formalize your agreement with Nevada Mail Service. This will include an Agreement form and a U.S. Postal Service form 1583. We are authorized to assign you a temporary mail forwarding address, but you must complete the necessary paperwork. **Your mail will not be forwarded to you until you have completed and submitted the signed and notarized Agreement, provide ID or scans of IDs, and USPS form 1583.** Nevada Mail Service's website is www.nevadamailservice.com, and their phone number is 800-570-6561.

What Address should your mail be forwarded to? (all fields required except Suite#)

Street	Suite#	City	State	Zip
<input type="text"/> *	<input type="text"/>	<input type="text"/> *	<input type="text"/> *	<input type="text"/> *

TRUST CHECKING ACCOUNT BANK

Your trust document includes a reference to a trust bank account. If you have a bank that you want to use, please enter the information below, so we can put the information on your checking account application. If you do not have a bank you plan to use leave the default "Bank in Nevada, To Be Named." You can change banks or add details by creating a new Minute/amendment after your trust has been completed. To maintain the strength of domicile of your trust, your bank account must be in Nevada.

NAME OF BANK: *

STREET:

CITY, STATE, ZIP:

PERSONAL BANKER'S NAME:

PERSONAL BANKER'S E-MAIL:

BANK PHONE:

EMPLOYER'S IDENTIFICATION NUMBER (EIN) WORKSHEET

We can use the information entered above to create a worksheet that will speed up completing your Employee Identification Number (EIN) application.

Do you want an EIN worksheet to assist you with the EIN Application? YES NO

YOUR CONTACT INFORMATION (as Trust Settlor)

As the person applying for and establishing a trust, you are called the trust Settlor.

YOUR NAME, FIRST:	<input type="text"/>	*	MIDDLE:	<input type="text"/>		LAST:	<input type="text"/>	*
STREET:	<input type="text"/>	*	SUITE:	<input type="text"/>				
CITY:	<input type="text"/>	*	STATE:	<input type="text"/>	*	ZIP:	<input type="text"/>	*
PHONE (HOME):	<input type="text"/>	*	PHONE (CELL):	<input type="text"/>				
EMAIL ADDRESS:	<input type="text"/>	*						