

## INSTRUCTIONS — TRUST INFORMATION FORM

**GENERAL:** This form provides the Clerk of Court with the information necessary to qualify trustees. This sheet contains special instructions to help you fill out this form. If you have any questions, you should telephone the Clerk. If you are unable to complete this form, the Clerk will help you. You should telephone the Clerk's office for an appointment before you go to the courthouse. Please complete as much of this form as possible before you see the Clerk.

**Line 1.** If this is a trust created by a will, state the decedent's full name, followed by the word "Deceased." If this is an *inter vivos* trust created by a person who was living at that time, state that person's full name, followed by the word "Settlor." If this is a trust created or augmented by court order (or authorized by court order to be created or augmented by an individual or organization) as a part of the settlement of a legal action, put the word "Court" on this line.

**Line 7.** This can be the same as the person making the request.

**Lines 11-14.** These lines are used to identify co-trustees, if there is more than one.

**Line 15.** Because of the difficulty in determining exact values at the time of qualification, the Clerk will accept a reasonable estimate of the maximum value of assets to be held in the trust. If you do not know the actual value of the trust's real property, you may use the value assessed for local real estate tax purposes.

**Lines 18-20.** These questions must be answered by the person(s) who wishes to be qualified as trustee by the Clerk. A "yes" answer to any of these questions does not automatically disqualify a person from serving. Each case must be decided by the court based on its specific facts.