

# Sample Trust + Will Intake Packet – Attorney Review

This sample illustrates a **COMBINED TRUST + WILL** intake. It includes revocable living trust formation data, successor administration planning, a high-level funding snapshot, and a pour-over will framework. This is a **client-prepared intake summary** for attorney review.

## Household Snapshot (fictional example)

<b>Grantor(s)</b>	John A. Carter (Age 42) & Emily R. Carter (Age 40)
<b>Address</b>	1428 Bayou Oaks Dr, Lafayette, LA 70506
<b>Children</b>	Lucas (16), Ava (12)
<b>Primary Goals</b>	Probate avoidance; continuity during incapacity; spouse-first plan; clear successor trustees

## Trust Formation

<b>Trust Name</b>	The Carter Family Revocable Living Trust
<b>Type</b>	Revocable living trust (joint trust requested)
<b>Timing Target</b>	Within 30–45 days
<b>Primary Residence</b>	Client prefers residence titled into trust after execution (subject to counsel guidance)

## Trustees & Successor Trustees

Role	Name	Relationship	Notes
Initial Trustee	John A. Carter	Self	Co-trustee requested with spouse
Co-Trustee	Emily R. Carter	Spouse	Co-trustee requested
Successor Trustee (1)	Emily R. Carter	Spouse	If John unable/deceased
Successor Trustee (2)	Michael T. Carter	Brother	If both grantors unavailable

## Beneficiaries & Distribution Design

**Primary beneficiary:** surviving spouse.

**Remainder beneficiaries:** Lucas Carter and Ava Carter, equal shares.

**Distribution standard:** Health, Education, Maintenance, and Support (HEMS).

**Age-based distribution preference (if minors):** 1/3 at 25, 1/3 at 30, balance at 35 (client preference).

## Guardianship (Minors)

**Primary Guardian**

Emily R. Carter

**Alternate Guardian**

Sarah Nguyen (family friend)

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## Funding Snapshot (Illustrative)

Clients provided the following asset summary to assist counsel with trust funding recommendations. Values are approximate and for intake purposes only.

Category	Institution / Description	Approx. Value	Current Title / Beneficiary	Funding Notes
Home	Primary residence (Lafayette, LA)	\$285,000	Joint w/ spouse	Client wants titled into trust
Bank	Checking – Bayou Community Bank	\$18,500	Joint w/ spouse	Retitle to trust after setup
Bank	Savings – Bayou Community Bank	\$42,000	Joint w/ spouse	Retitle to trust after setup
Brokerage	Vanguard taxable brokerage	\$96,000	Joint	Retitle to trust; keep TOD off
Retirement	401(k) – Employer plan	\$164,000	Beneficiary: spouse	Confirm beneficiary designations
Life Insurance	Term policy	\$250,000	Beneficiary: spouse	Consider contingent beneficiaries
Vehicle	2020 Ford Explorer	\$22,000	John	Typically keep outside trust (confirm)

## Pour-Over Will Summary

Clients understand that any assets not titled in the trust at death should pour over into the trust via a pour-over will, subject to probate rules where applicable.

## Special Bequests & Instructions

Type	Recipient	Description	Notes
Charitable	St. Jude Children's Research Hospital	\$10,000 (from estate/trust)	Confirm best placement
Family	Michael T. Carter	Firearm collection (list separately)	Transfer per law
Personal Effects	Surviving spouse	All tangible personal property	Standard clause preferred

## Notes to Counsel

<b>Planning Priorities</b>	Probate avoidance; smooth transition on incapacity; clear successor trustees; protect minors.
<b>Incapacity Planning</b>	Client expects POA/health care directives; wants recommendations.
<b>Concerns</b>	Avoid family conflict; keep process simple; ensure guardian/trustee roles are clear.

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**Questions for Counsel**

Confirm Louisiana-specific trust options; confirm best practice for joint trust; confirm minor distributions/UTMA vs subtrusts.

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