

Living Trust Packet | Fillable Worksheet

Complete online, download as PDF, print, and sign with witnesses/notary as required in your state.

1) Grantor Information

Grantor Full Name

Co-Grantor Name (if applicable)

Mailing Address

City / State / ZIP

2) Trustee Designation

Primary Trustee

Successor Trustee

3) Beneficiaries

Primary Beneficiary(ies)

Contingent Beneficiary(ies)

4) Acknowledgments

I understand this packet is informational and not legal advice.

I will consult a licensed estate-planning attorney if legal review is needed.

Grantor Signature (print/sign after download): _____ Date: _____