

# THE COMPANY PEOPLE

TESTAMENTARY TRUST ORDER FORM – Page 1

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## FIRM/PERSON PLACING ORDER

Firm Name:

Contact Name:

Address:

Phone:

A Testamentary Trust is a Trust that incorporates a Will. This order form is divided into four sections (please complete all sections). They are:

SECTION A: PERTAINING TO BOTH THE WILL AND TRUST

SECTION B: PERTAINING TO THE WILL

SECTION C: PERTAINING TO THE TRUST

SECTION D: PAYMENT DETAILS

## SECTION A: PERTAINING TO BOTH THE WILL AND TRUST

State/Territory of Jurisdiction \_\_\_\_\_

### TESTATOR

Name of Testator \_\_\_\_\_

Residential Address \_\_\_\_\_  
\_\_\_\_\_

Occupation \_\_\_\_\_

## SECTION B: PERTAINING TO THE WILL

### FIRST EXECUTOR

Name of first Executor \_\_\_\_\_

Residential Address \_\_\_\_\_  
\_\_\_\_\_

### SECOND EXECUTOR (Optional)

Name of second Executor \_\_\_\_\_

Residential Address \_\_\_\_\_  
\_\_\_\_\_

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BENEFICIARIES OF THE WILL

1 Full name \_\_\_\_\_ 3 Full name \_\_\_\_\_  
2 Full name \_\_\_\_\_ 4 Full name \_\_\_\_\_

SPECIFIC BEQUESTS TO BENEFICIARIES OF THE WILL (Optional)

Bequest to Beneficiary 1 \_\_\_\_\_  
Bequest to Beneficiary 2 \_\_\_\_\_  
Bequest to Beneficiary 3 \_\_\_\_\_  
Bequest to Beneficiary 4 \_\_\_\_\_

NOMINATED GUARDIAN OF DEPENDANTS (Optional)

Full name \_\_\_\_\_

**SECTION C: PERTAINING TO THE TRUST**

FIRST TRUSTEE

Same as First Executor ? : YES / NO

If 'NO':

Name of first Trustee \_\_\_\_\_  
Residential address \_\_\_\_\_  
\_\_\_\_\_

SECOND TRUSTEE (Optional)

Same as Second Executor ? : YES / NO

If 'NO':

Name of second Trustee \_\_\_\_\_  
Residential Address \_\_\_\_\_  
\_\_\_\_\_

SPECIFIED BENEFICIARIES OF THE TRUST (Optional)

Same as for the Will ? : YES / NO

If 'NO':

1 Full name \_\_\_\_\_ 2 Full name \_\_\_\_\_  
2 Full name \_\_\_\_\_ 4 Full name \_\_\_\_\_

