

THE COMPANY PEOPLE

TESTAMENTARY TRUST ORDER FORM – Page 1

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FIRM/PERSON PLACING ORDER

Firm Name:

Contact Name:

Address:

Phone:

Fax:

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	_____

