

CONFIDENTIAL CHARITABLE REMAINDER TRUST QUESTIONNAIRE

THE RUSHFORTH FIRM, LTD.
A NEVADA PROFESSIONAL LAW CORPORATION

1. CLIENTS; CLIENT AND SPOUSE.

HUSBAND / MALE		WIFE / FEMALE		MAILING ADDRESS	
Full Name (as it appears on legal documents) [] -Not US citizen		Full Name (as it appears on legal documents) [] -Not US citizen			
Name (as you want it in your documents) [] -Settlor; [] -Income Beneficiary		Name (as you want it in your documents) [] -Settlor; [] -Income Beneficiary			
Birth Date		Birth Date			
Social Sec. #		Social Sec. #			
Internet e-mail address:	Work Phone:	Internet e-mail address:	Work Phone:	Home Phone:	Fax:

2. CHARITABLE BENEFICIARIES. (Provide the legal name, address, and tax identification number for each beneficiary. Attach additional sheets if necessary.)

LEGAL NAME / TAX IDENTIFICATION NUMBER	IRREVOCABLE?	ADDRESS AND PHONE	PERCENTAGE OR OTHER FRACTION
	Y N		
	Y N		
	Y N		
	Y N		
	Y N		
Survivor: Survivor may change beneficiaries as to _____%.			
Check one: [] -Charitable beneficiaries are limited to 50% charities (e.g., public charities). [] -Charitable beneficiaries can include 30% charities (e.g., private foundations).			

3. TRUSTEES. (Include name, address & phone.)

CAPACITY	INITIAL TRUSTEE	SUCCESSOR #1	SUCCESSOR #2
TRUSTEE (To manage trust assets)			

4. **QUESTIONS.**

- a. *Trust payments may be calculated as a percentage of either (i) the initial value of assets at the time of contribution or (ii) the annual valuation of assets (which means that the payments to the income beneficiary will go up if assets appreciate and will go down if assets depreciate). Which do you want?*
 -Based on initial value (CRAT); -Based on annual valuation (CRUT).
- b. *Are additional contributions to the trust desired?*
 -Y; -N [NOTE: A CRAT cannot permit additional contributions.]
- c. *If a CRUT is used:*
- i. *Should distributions to the income beneficiary be limited to trust income so that the original principal is never spent? -Income only [NICRUT or NIMCRUT]; -Principal if income is insufficient [standard CRUT]. If limited to income, should this change (“flip”) after a period of years or when non-income producing property is sold? -Y; -N*
- ii. *If the trust has insufficient income to make the full payment for that year, should the trust include a “make-up clause” that allows income in a future year that exceeds that year’s payment to be paid to make up the deficiency for prior year? -Y (NIMCRUT); -N (Standard or NICRUT) [NOTE: The make-up provision will be cancelled if the trust “flips” from an income-only trust to an income-then-principal trust.]*

5. **ADDITIONAL INFORMATION.**

Name of Charitable Trust		
Unitrust or Annuity Percentage		Post contribution capital gain included as income? <input type="checkbox"/> -Y (default); <input type="checkbox"/> -N
Term of Trust	<input type="checkbox"/> -Term of ___ years; <input type="checkbox"/> -Until death of sole Settlor; <input type="checkbox"/> -Until death of surviving Settlor (or Settlor and spouse); <input type="checkbox"/> -Until death of each spouse as to half.	
Community or separate property?	<input type="checkbox"/> -All separate; <input type="checkbox"/> -All community; <input type="checkbox"/> -Some of each.	
Trust Assets to be Contributed	Fair-Market Value: \$	Cost Basis: \$
Estimated Annual Income	Currently: \$	After any anticipated sale: \$
Estimated Capital Appreciation	Currently: \$	After any anticipated sale: \$
Referred by		

6. **FOR OFFICE USE.**

Type of Trust (Check all that apply)	<input type="checkbox"/> -CRUT (annual valuation) or <input type="checkbox"/> -CRAT (initial valuation; no additions). If CRUT, is it a <input type="checkbox"/> -NIMCRUT or <input type="checkbox"/> -NIMCRUT/Flip? If NIMCRUT, explain trigger for flip: <input type="checkbox"/> -Sale of asset; <input type="checkbox"/> -After ___ years; Other:
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ENGAGEMENT: Base Fee \$ Retainer Fee \$