

# CLT TRUST DATA

Name of Trust: \_\_\_\_\_  
Date of Trust: \_\_\_\_\_  
Trust Tax ID#: \_\_\_\_\_

## **Grantor(s):**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security #: \_\_\_\_\_

## **Trustee(s):**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

**Charitable Income Beneficiary(s):**

Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Website: \_\_\_\_\_

Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Website: \_\_\_\_\_

Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Website: \_\_\_\_\_

Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Website: \_\_\_\_\_

Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Website: \_\_\_\_\_

Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Website: \_\_\_\_\_

**Remainder Non-Charitable Beneficiaries:**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

**Type of Trust:** *(check applicable type)*

Charitable Lead Annuity Trust (CLAT) - Grantor \_\_\_\_\_  
Charitable Lead Annuity Trust (CLAT) - Nongrantor \_\_\_\_\_  
Charitable Lead Unitrust (CLUT) – Grantor \_\_\_\_\_  
Charitable Lead Unitrust (CLUT) – Nongrantor \_\_\_\_\_

**Income Pay-Out Rate:** \_\_\_\_\_%

**Income Pay-Out Frequency:** Monthly Quarterly Semi-Annual Annual  
*(Circle applicable frequency)*

**Term of Trust:** *(check applicable term)*

Lifetime(s) \_\_\_\_\_  
Term of \_\_\_\_\_ years \_\_\_\_\_

**Custodial Account(s):**

(1) Name of Institution: \_\_\_\_\_

Account #: \_\_\_\_\_

Are Fees/Distributions paid from this account? *(Circle one)* YES NO

(2) Name of Institution: \_\_\_\_\_

Account #: \_\_\_\_\_

Are Fees/Distributions paid from this account? *(Circle one)* YES NO

(3) Name of Institution: \_\_\_\_\_

Account #: \_\_\_\_\_

Are Fees/Distributions paid from this account? *(Circle one)* YES NO

(4) Name of Institution: \_\_\_\_\_

Account #: \_\_\_\_\_

Are Fees/Distributions paid from this account? *(Circle one)* YES NO

***Lair Administration Services, L.L.C.***  
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