

INFORMATION NEEDED FOR IMPLEMENTATION OF ESTATE PLAN

Name **委託人** \_\_\_\_\_ Gender: M男 / F女 Telephone 電話: \_\_\_\_\_  
 Status **婚姻現狀**: ☐ Single 單身 / ☐ Married 已婚 / ☐ Widow 喪偶 / ☐ Divorce 離婚 U.S citizen美國公民: ☐ Yes是 ☐ No否

Name **委託人** \_\_\_\_\_ Gender: M男 / F女 Telephone 電話: \_\_\_\_\_  
 Status **婚姻現狀**: ☐ Single 單身 / ☐ Married 已婚 / ☐ Widow 喪偶 / ☐ Divorce 離婚 U.S citizen美國公民: ☐ Yes是 ☐ No否

Relationship between the Trustor **委託人關係** \_\_\_\_\_ Email 電郵: \_\_\_\_\_ \*use for send digital copy

Document Title 信託名稱: \_\_\_\_\_

Address 地址: \_\_\_\_\_

**Please give us the names of the people whom you would like to act as Trustees, Successors and Agent to make healthcare decision and attorney-in-fact to sign on financial documents for you after you can no longer act. \*If more than one person for the Trustee, healthcare decision agent or attorney-in-fact, please choose Joint/ Separately.**

請指示信託代理人, 繼承人, 醫療抉擇代理人, 財務簽名代理人 (名單請以順位排列). 如果多於一個代理人, 請選擇代理權是聯合或單獨代理.

\*If all of the Trustors deceased, who will be the next trustee? 如果所有委託人去世, 誰將會成為信託的代理人

Trustee 信託代理人 \_\_\_\_\_ Relationship關係 \_\_\_\_\_ Joint 聯合 / Separately單獨

Trustee 信託代理人 \_\_\_\_\_ Relationship關係 \_\_\_\_\_ Joint 聯合 / Separately單獨

1. Successor **繼承人** \_\_\_\_\_ DOB 生日: \_\_\_\_\_ Relationship關係 \_\_\_\_\_ Share分配% \_\_\_\_\_

\*if this primary deceased, who will be the person to replace this successor 如果這個主繼承人離世了, 誰將會接替成為此繼承人

Contingent Successor **繼承人** \_\_\_\_\_ DOB 生日: \_\_\_\_\_ Relationship關係 \_\_\_\_\_

2. Successor **繼承人** \_\_\_\_\_ DOB 生日: \_\_\_\_\_ Relationship關係 \_\_\_\_\_ Share分配% \_\_\_\_\_

\*if this primary deceased, who will be the person to replace this successor 如果這個主繼承人離世了, 誰將會接替成為此繼承人

Contingent Successor **繼承人** \_\_\_\_\_ DOB 生日: \_\_\_\_\_ Relationship關係 \_\_\_\_\_

3. Successor **繼承人** \_\_\_\_\_ DOB 生日: \_\_\_\_\_ Relationship關係 \_\_\_\_\_ Share分配% \_\_\_\_\_

\*if this primary deceased, who will be the person to replace this successor 如果這個主繼承人離世了, 誰將會接替成為此繼承人

Contingent Successor **繼承人** \_\_\_\_\_ DOB 生日: \_\_\_\_\_ Relationship關係 \_\_\_\_\_

4. Successor **繼承人** \_\_\_\_\_ DOB 生日: \_\_\_\_\_ Relationship關係 \_\_\_\_\_ Share分配% \_\_\_\_\_

\*if this primary deceased, who will be the person to replace this successor 如果這個主繼承人離世了, 誰將會接替成為此繼承人

Contingent Successor **繼承人** \_\_\_\_\_ DOB 生日: \_\_\_\_\_ Relationship關係 \_\_\_\_\_

Healthcare decision Agent 醫療抉擇代理人 \_\_\_\_\_ Relationship關係 \_\_\_\_\_ Joint 聯合 / Separately單獨

Healthcare decision Agent 醫療抉擇代理人 \_\_\_\_\_ Relationship關係 \_\_\_\_\_ Joint 聯合 / Separately單獨

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Attorney -in-fact 財務簽名代理人 \_\_\_\_\_ Relationship關係 \_\_\_\_\_ Joint 聯合 / Separately單獨  
Attorney -in-fact 財務簽名代理人 \_\_\_\_\_ Relationship關係 \_\_\_\_\_ Joint 聯合 / Separately單獨

Please give us the names of Guardians of minor children, in order of preference. 請指示小孩的法定監護人(名單請以順位排列)

Guardian法定監護人 \_\_\_\_\_ for Child Name小孩名 \_\_\_\_\_ Relationship關係 \_\_\_\_\_

Guardian法定監護人 \_\_\_\_\_ for Child Name小孩名 \_\_\_\_\_ Relationship關係 \_\_\_\_\_

At what age would you like your children to take their shares after the death of surviving spouse, if not outright?

繼承者幾歲可以全權領取繼承的財產: \_\_\_\_\_

Please furnish us with the address, copy of the grant deed / property tax bill for each property which you own.

請提供所有房屋地址, 房地稅單據 / 房契影印本 。

Property 房屋地址: \_\_\_\_\_  
☐ Owner occupied 自住 / ☐ Rental 出租 Joint-Tenant / Tenant-in-common share% \_\_\_\_\_ for Trustor \_\_\_\_\_

Property 房屋地址: \_\_\_\_\_  
☐ Owner occupied 自住 / ☐ Rental 出租 Joint-Tenant / Tenant-in-common share% \_\_\_\_\_ for Trustor \_\_\_\_\_

Property 房屋地址: \_\_\_\_\_  
☐ Owner occupied 自住 / ☐ Rental 出租 Joint-Tenant / Tenant-in-common share% \_\_\_\_\_ for Trustor \_\_\_\_\_

Property 房屋地址: \_\_\_\_\_  
☐ Owner occupied 自住 / ☐ Rental 出租 Joint-Tenant / Tenant-in-common share% \_\_\_\_\_ for Trustor \_\_\_\_\_

5. Please give us a list of any other assets, including business and/or partnership interests which you may have, including the name of the asset and how title is held. For Corporation, please provide the Minutes ; and for LLC, please provide the operating agreement.

請提供您所擁有的公司及合作投資項目的正確名稱(清楚註明公司負責人名單)

Name of Company 公司名字: \_\_\_\_\_ Share % \_\_\_\_\_ for Trustor \_\_\_\_\_

Name of Company 公司名字: \_\_\_\_\_ Share % \_\_\_\_\_ for Trustor \_\_\_\_\_

Signature 簽名: \_\_\_\_\_

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What would you like your trust to be?

你希望你的信託是如何被繼承？

❖ If **ALL** Trustors are US citizen, please choose one of the following:

如果所有的委託人都是美國公民，請選擇以下其中一項：

☐ At the time of the death of the predeceased spouse, all assets in the trust should go to the surviving spouse.

在第一個配偶去世時，信託中的所有資產都歸未亡配偶所有。

☐ At the time of the death of the predeceased spouse, the half of the trust assets belonging to the predeceased spouse will go into an irrevocable trust for the surviving spouse.

在第一個配偶去世時，信託中的所有資產先歸未亡配偶所有，但屬於去世配偶的信託資產將進入不可更改或撤銷信託。

☐ At the time of the death of the predeceased spouse, the half of the trust assets belonging to the predeceased spouse will go directly to the Successor.

在第一個配偶去世時，屬於去世配偶的信託資產將直接歸繼承人。

❖ If **Either** Trustor is NOT US citizen, please choose one of the following:

如果任何一方委託不是美國公民，請選擇以下其中一項：

☐ At the time of the death of the predeceased spouse, the half of the trust assets belonging to the predeceased spouse will go into an irrevocable trust for the surviving spouse.

在第一個配偶去世時，信託中的所有資產先歸未亡配偶所有，但屬於去世配偶的信託資產將進入不可更改或撤銷信託。

☐ At the time of the death of the predeceased spouse, the half of the trust assets belonging to the predeceased spouse will go directly to the Successor.

在第一個配偶去世時，屬於去世配偶的信託資產將直接歸繼承人所有。

Remark 備註：