

Living Trust Prep Worksheet

Fillable Prep Worksheet — ClearLegalTips.com (2026)

INSTRUCTIONS FOR USE

Gather this information before you start the online process so you can finish in one sitting. Fill the blanks; tick boxes as you complete each item.

Trust Roles

Grantor (you): _____

Initial trustee: _____

Successor trustee: _____

Beneficiaries: _____

Assets to Fund

- ☐ Real estate
- ☐ Bank / investment accounts
- ☐ Vehicles / valuables

Distribution

Who gets what (shares): _____

Any age/condition restrictions: _____

Notes

This resource is provided by ClearLegalTips.com for general informational purposes only and does not constitute legal advice. Laws vary by state and change over time. Consult a licensed attorney for advice specific to your situation.