**Florida Revocable Trust Intake Form**

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| **Confirm who will act as the initial trustee(s):**  \*Note: we prefer that a Florida resident act as the trustee. If a Florida resident cannot act as trustee, please sign the trust in Florida  \*Note: you can name more than one trustee |  |
| **Who will act as the successor trustee(s):**  \*Note: you can name more than one trustee |  |
| **Name the primary beneficiaries of this trust:** |  |
| **Will the primary beneficiaries be provided for equally:** |  |
| **Name the secondary beneficiaries (i.e. who will take the property of the trust after the life of the initial beneficiaries):** |  |
| **Will the secondary beneficiaries’ portion of the trust be distributed outright after the life of the primary beneficiaries or will their portion remain in trust?** |  |
| **If the secondary beneficiaries portion will remain in trust, please confirm the terms:** |  |
| **Do you have any special requests regarding specific property placed under this trust?**  (Example: for real property, a provision of the trust can specify that the property should be sold within a certain time frame and the proceeds distributed to the beneficiaries) |  |

\*\*Please provide a copy of the passport for each Trustee, Primary Beneficiary and Secondary Beneficiary. If you are uncomfortable providing a passport for the secondary beneficiaries, please confirm the legal name of the beneficiary.