

**3 - TRUST PETITION INDIVIDUAL BENEFICIARY
CONTACT WORKSHEET
[10-2026 Revision]**

DECEDENT'S NAME	
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Please provide me with complete information for the following:

- Decedent's living spouse, children and stepchildren, if any
- Decedent's living parents, if any
- Decedent's living brother, sister, stepbrother or stepsister, if any
- The children of a predeceased child or stepchild of the Decedent (i.e., grandchildren)
- Any other person named in Decedent's trust as a beneficiary
- The children of any predeceased beneficiary of Decedent's Trust
- The children of any predeceased child of a beneficiary of Decedent's trust

PLEASE INDICATE THE RELATIONSHIP OF THE PERSON TO THE DECEDENT

PERSON'S FULL LEGAL NAME		
☐ Male ☐ Female ☐ Adult ☐ Special Needs Person ☐ CURRENT RESIDENCE UNKNOWN ☐ Minor If a minor, date of birth below		
If a minor, date of birth →→→→→→→→		
☐ Surviving Spouse ☐ Surviving Domestic Partner ☐ Son ☐ Daughter ☐ Stepson ☐ Stepdaughter ☐ Grandson ☐ Granddaughter ☐ Brother ☐ Sister ☐ Stepbrother ☐ Stepsister ☐ Father ☐ Mother ☐ Aunt ☐ Uncle ☐ Cousin ☐ Friend		
☐ Other Relationship		
U.S. Citizen ☐ Yes ☐ No	If not U.S. Citizen, citizen of →→→→→→→	
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