

3a -TRUST PETITION ADDITIONAL INDIVIDUAL BENEFICIARY ORKSHEET

Law Offices of Robert P. Bergman, www.lawbob.com / (408) 247-0444 / rpb@lawbob.com (10-2026 Revision) Page 1

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 →→→→→→→→	
Street Address			
City, State and Zip Code			
Best Contact Telephone			
Best Personal Contact Email			

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