



WILLIS & CAGLE LAW FIRM

118 E. Graham Avenue | P.O. Box 1062 | Pryor, Oklahoma 74362 | (918) 876-5605

CLIENT INTAKE FORM TRUST ADMINISTRATION

CLIENT INFORMATION

Legal Name (Last, First, Middle)

Date of Birth

Current Address (Street, City, State, ZIP)

Telephone Number

Best Time of Day to Reach You

Email Address

Employer Name

Employer Phone Number

Employer Address

Occupation / Position

The information above should reflect you, the Trustee or Successor Trustee completing this form.

TRUST INFORMATION

Name of Trust

Date Trust Was Executed

Settlor(s)/Grantor(s) Full Legal Name

Date of Settlor's Death or Incapacity (if applicable)

Prefer to complete your form by hand? Print the form and bring it to your meeting or contact our office at (918) 876-5605 and we'll have one ready for you at your appointment.

Your Role (Successor Trustee, Co-Trustee, etc.) and Date You Assumed the Role

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BENEFICIARIES

Oklahoma trust law requires that all qualified beneficiaries receive notice and periodic accountings from the trustee. Please list every current and remainder beneficiary along with current contact information.

Full Legal Name	Relationship to Settlor	Current or Remainder	Address	Phone/Email

TRUST ASSETS (GENERAL OVERVIEW)**Real Property (Address, Approximate Value)**

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Bank Accounts, Investments, and Other Financial Accounts (Institution, Approximate Value)

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Business Interests and Other Significant Assets

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ADDITIONAL INFORMATION

Is there any dispute among beneficiaries, or any pending litigation involving the trust, that you are aware of? (Yes / No — if yes, please describe)

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