

Charitable Lead Trust (CLT) Donor Intake Form

Instructions: Please complete this form to initiate the design and implementation of your Charitable Lead Trust. This document is for intake and print purposes.

1. Donor (Grantor) Information

Full Legal Name:

Spouse Name (if applicable):

Mailing Address:

Phone Number:

Email Address:

2. Trust Specifications

Proposed Trust Name:

Trust Type (Enter "CLAT" for Annuity or "CLUT" for Unitrust):

Trust Term (Enter number of years or "Lifetime"):

Funding Asset (e.g., Cash, Real Estate, Public Stock):

Estimated Funding Value (USD):

Target Payout Rate to Charity (%):

3. Charitable Beneficiary (Lead Interest)

Charitable Organization Name:

Charity EIN / Tax ID (if known):

Contact Person & Phone Number:

4. Non-Charitable Beneficiary (Remainder Interest)

Remainder Beneficiary Name(s):

Relationship to Donor:

5. Professional Advisors

Estate Planning Attorney Name:

CPA / Tax Advisor Name: