

Charitable Remainder Trust (CRT) Information Sheet

Please complete this information sheet for the administration and record-keeping of the Charitable Remainder Trust. This document is designed for physical printing and manual or digital completion.

1. Trust Overview

Full Name of Trust:

Date of Trust Agreement:

Trust Tax Identification Number (EIN):

Trust Type (e.g., CRUT - Unitrust, CRAT - Annuity):

2. Grantor / Donor Information

Grantor Full Name:

Social Security Number / Tax ID:

Street Address:

City, State, Zip Code:

Telephone Number:

Email Address:

3. Trustee Information

Trustee Name (Individual or Corporate):

Contact Person (if Corporate Trustee):

Mailing Address:

City, State, Zip Code:

Telephone Number:

4. Income Beneficiary Information (Recipients of Trust Payments)

Primary Beneficiary

Full Name:

Date of Birth:

Social Security Number:

Payout Percentage or Fixed Dollar Amount (e.g., 5% or \$10,000):

Secondary Beneficiary (if applicable)

Full Name:

Date of Birth:

Social Security Number:

5. Charitable Remainder Beneficiary (The Charity)

Legal Name of Charity:

Charity EIN / Tax ID:

Mailing Address:

Contact Person at Charity:

Percentage Share of Remainder (if multiple charities, specify percentage):

6. Trust Funding and Asset Details

Description of Asset(s) Used to Fund Trust (e.g., Real Estate, Stocks, Cash):

Initial Estimated Fair Market Value of Asset(s):

Cost Basis of Asset(s):

7. Payment Administration Details

Payment Frequency (e.g., Monthly, Quarterly, Annually):

Valuation Date (for CRUTs - e.g., First Business Day of Year):