

Data Entry Worksheet - Revocable Trust (56)

Advisor Name: _____ **Firm:** _____
Street Address: _____ **City:** _____ **State:** _____ **ZIP:** _____
Phone: _____ **Fax:** _____ **Email:** _____
Donor(s) Name(s): _____

Gift Date: ____/____/_____
(Date of trust funding)

Donor Name and Birth Date:

1. _____ DOB ____/____/____

Year of Death: _____
(Expected or actual)

DSUEA \$ _____
(Deceased Spouse Unused Exclusion Amount)

Trust Amount: \$ _____
(Fair market value of property)

Estate Size: \$ _____
(Current total estate value of donor)

Growth Rate: _____ %
(Estimated growth rate of estate, e.g., 3%)

Estate Costs: _____ %
(Estimated probate and administration costs, e.g., 2%)