

CONFIDENTIAL QUESTIONNAIRE FOR REVOCABLE IRA TRUST

RUSHFORTH FIRM LTD.

A Nevada Professional Limited-Liability Company

1. CLIENT(S); SIGNIFICANT OTHER.

NAME(S) OF CLIENT(S) / SIGNIFICANT OTHER				MAILING ADDRESS	
A) Full Name (as it appears on legal documents)		B) Full Name (as it appears on legal documents)			
[]-Not US citizen		[]-Non-Client Significant Other []-Not US citizen			
Name (as you want it in your documents)		Name (as you want it in your documents)			
Birth Date		Birth Date			
Social Sec. #		Social Sec. #			
Internet e-mail address:	Work Phone:	Internet e-mail address:	Work Phone:	Home Phone:	Fax:

2. CHILDREN & BENEFICIARIES. (Name all beneficiaries. Name all children and the children of each deceased child, including those who will receive nothing. Attach additional sheets if necessary. **Spell the names as you want them in the documents.**)

NAME (SPECIFY RELATIONSHIP IF NOT CHILD.)	BIRTH DATE / SEX	ADDRESS AND PHONE	RELATED TO: * (Circle One)
[] - Disabled or Minor	M F		A B Both
[] - Disabled or Minor	M F		A B Both
[] - Disabled or Minor	M F		A B Both
[] - Disabled or Minor	M F		A B Both
[] - Disabled or Minor	M F		A B Both
[] - Disabled or Minor	M F		A B Both

*A=Client #1; B=Client #2 or Significant Other

3. **FIDUCIARIES AND ALTERNATES.** (Include name, address & phone. Do not list yourself; however, unless you attach an explanation, we will assume that you will act as initial trustee, and if there is a spouse/partner, you will act together, with the survivor acting alone. If each spouse/partner wants different fiduciaries, please indicate.)

	FIRST CHOICE	SECOND CHOICE	THIRD CHOICE
TRUSTEE			

4. **DISTRIBUTION.**

(a) Eligible (life-expectancy) Beneficiaries (Check one.):

- (1) -Conduit; OR
 (2) -Discretionary.

(b) Ineligible (10-year) Beneficiaries (Check one.):

- (1) -10% a year for 10 years;
 (2) -Discretionary for 10 years; and then (after the IRA is closed):
- a. -Pour into each beneficiary's share under this trust: _____
 [Please provide copy of trust agreement or certification.]; OR
 - b. -Lump-sum distribution; OR
 - c. -Discretionary distributions for life; OR
 - d. -___% for ___ years; OR
 - e. -Generation-skipping (dynasty) trust for perpetuities period; OR
 - f. -Please provide a written plain-English explanation of how you want the trust assets distributed

5. **ADDITIONAL INFORMATION.**

Name of Trust:	
Referred by:	