

Data Entry Worksheet - Testamentary Lead Trust (59)

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

Gift Date: ____/____/____ <small>(Date of death, estimated or actual)</small>
Unitrust Grantor: _____
Estate Value: \$ _____ <small>(Fair market value of all assets owned by the grantor at date of death)</small>
Estate Costs: \$ _____ or _____ % <small>(This includes expenses for burial, last illness, probate, etc., e.g., 2%)</small>

Adjusted Taxable Gifts: \$ _____ <small>(Prior taxable gifts over annual exclusion)</small>
Gift Tax Paid: \$ _____ <small>(Tax paid within three years of death)</small>
Family Limited Partnership / Lead Trust Option FLP Discount Percent: _____ %
Payment Frequency: Annual Semi-annual Quarterly Monthly

Number of Distributions to Family:				
1	2	3	4	

Trust 1		
Trust Type:	Unitrust Annuity Trust	
Trust Amount \$	_____	
Trust Payout %	_____ %	
Trust Return %	_____ %	
Term of Years:	_____	
Generation Skip Option:	Yes No	

Trust 3		
Trust Type:	Unitrust Annuity Trust	
Trust Amount \$	_____	
Trust Payout %	_____ %	
Trust Return %	_____ %	
Term of Years:	_____	
Generation Skip Option:	Yes No	

Trust 2		
Trust Type:	Unitrust Annuity Trust	
Trust Amount \$	_____	
Trust Payout %	_____ %	
Trust Return %	_____ %	
Term of Years:	_____	
Generation Skip Option:	Yes No	

Trust 4		
Trust Type:	Unitrust Annuity Trust	
Trust Amount \$	_____	
Trust Payout %	_____ %	
Trust Return %	_____ %	
Term of Years:	_____	
Generation Skip Option:	Yes No	