

**IN THE CIRCUIT COURT OF FAIRFAX
TRUST INFORMATION FORM**

PLEASE PRINT CLEARLY

Fiduciary Number _____

1. Name of estate or settler:

2. If court-ordered trust, date of order and case number: _____

3. Basis for request: Trustee named in will Other (specify)

4. Name, address & telephone number for ALL PERSONS seeking appointment as Trustee:
 - A. Name: _____
 Address: _____
 Home phone: (_____) _____ Work phone: (_____) _____
 Email: _____
 Employer: _____
 Work address: _____

 - B. Name: _____
 Address: _____
 Home phone: (_____) _____ Work phone: (_____) _____
 Email: _____
 Employer: _____
 Work address: _____

 - C. Name: _____
 Address: _____
 Home phone: (_____) _____ Work phone: (_____) _____
 Email: _____
 Employer: _____
 Work address: _____

 - D. Name: _____
 Address: _____
 Home phone: (_____) _____ Work phone: (_____) _____
 Email: _____

Employer: _____

Work address: _____

NOTE: If the person seeking appointment is **NOT a Virginia resident, you will need a Virginia resident to either co-qualify as executor/administrator or to be appointed as the resident agent. If the Virginia resident will co-qualify with you, they must attend the appointment with you. If the Virginia resident is just going to serve as your resident agent you must mail to us (before the appointment) a completed, notarized Resident Agent form. Please use the form entitled *Appointment of Resident Agent by Nonresident Fiduciary Form* located on the Fairfax Circuit Court's website at:**

<https://www.fairfaxcounty.gov/circuit/sites/circuit/files/assets/documents/pdf/appointment-of-resident-agent-living-and-family-trusts.pdf>

5. Value of the trust estate: \$ _____
6. Name of attorney, if any: _____
Attorney's mailing address & telephone number: _____

INFORMATION TO BE FURNISHED BY EACH PERSON SEEKING QUALIFICATION

7. Are you a person under a disability? (See Instructions for Explanation) Yes No
8. Have you ever been convicted of a felony? Yes No
9. Have you ever filed for bankruptcy? Yes No
10. Are you now, or have you ever been, an attorney at law in Virginia or elsewhere? Yes No
(If yes, and you do not now possess and active license from the Virginia State Bar, explain the details on a separate sheet of paper.)

I (we) hereby certify that to the best of my (our) knowledge and belief this is an accurate statement of facts, and I (we) acknowledge a continuing duty to report any later discovered errors or inconsistencies to the Clerk of Court.

Date Printed Name of Requesting Person Signature of Requesting Person

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INSTRUCTIONS – TRUST INFORMATION FORM

GENERAL: This form provides the Clerk of Court with the information necessary to qualify trustees. This sheet contains special instructions to help you fill out this form. If you have any questions, you should contact the Fiduciary Section. You should contact the Clerk's office for an appointment before you go to the courthouse. Please complete as much of this form as possible before you meet with the Probate Clerk.

Line 1: If this is a trust created by a will, then state the decedent's full name, followed by the work "Deceased". If this is an inter vivos trust created by a person who was living at that time, state that person's name. If this is a trust created or augmented by court order (or authorized by court to be created or augmented by an individual or organization) as part of a settlement of a legal action, put the work "Court" on this line.

Line 4: This line is to be used to identify the trustee or co-trustees, if more than one.

Line 5: Because of the difficulty on determining exact values at the time of qualification, the Clerk will accept a reasonable estimate of the fair market value of the trust's personal property and if you do not know the actual value of the trust's real property, then you may use its assessed value for local real estate tax purposes.

Line 7: A person under a disability as defined in Virginia Code §8.01-2 is not eligible to qualify. You are considered to be under a disability if (1) you have been convicted of a felony and are still in prison; (2) you are under 18 years of age; (3) you are a drug addict or alcoholic as defined in Virginia Code §37.2-100; (4) you are an incapacitated person as defined in Virginia Code §64.2-2016.

Lines 8-10: A "yes" answer does not automatically disqualify a person from serving. Each case must be decided by the court based on its specific facts.