

# TRUST AGREEMENT TEMPLATE

Trust Name: \_\_\_\_\_ Trustee(s): \_\_\_\_\_

## Grantor (Settlor) Information:

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone/Email: \_\_\_\_\_

## Trustee(s) Information:

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone/Email: \_\_\_\_\_

## Beneficiaries:

Name(s): \_\_\_\_\_

Relationship: \_\_\_\_\_

Share/Interest: \_\_\_\_\_

## Trust Property:

~~Description of Assets to be Held in Trust;~~ securities, and other assets transferred to the Trust.)

## Article 1 – Creation of Trust

The Grantor hereby transfers and delivers to the Trustee the property described above to hold in trust, under the terms and conditions set forth herein, for the benefit of the Beneficiaries named in this Agreement.

## Article 2 – Trust Purpose

The purpose of this Trust is to hold, manage, invest, and distribute the Trust property for the benefit of the Beneficiaries according to the terms specified in this Agreement and applicable law.

## Article 3 – Trustee Powers and Duties

The Trustee shall have all powers and duties permitted under the laws of the State of \_\_\_\_\_, including, but not limited to, the power to invest and reinvest Trust assets, to sell, lease, or exchange property, to make distributions to Beneficiaries, and to perform all acts necessary for the proper administration of the Trust.

## Article 4 – Distributions

The Trustee shall distribute income and/or principal to the Beneficiaries as follows: (describe terms of distributions such as amounts, timing, conditions, and discretion granted to Trustee).

## Article 5 – Revocation and Amendment

This Trust is \_\_\_\_\_ (revocable/irrevocable). The Grantor reserves the right to revoke or amend this Trust by written instrument delivered to the Trustee, except as otherwise provided in this Agreement.

**Article 6 – Trustee Succession**

In the event the Trustee resigns, is unable, or unwilling to serve, successor Trustee(s) shall be appointed as follows: (describe method of successor appointment or name successor Trustees).

**Article 7 – Governing Law**

This Trust Agreement shall be governed by and construed in accordance with the laws of the State of \_\_\_\_\_, without regard to its conflict of laws principles.

**Article 8 – Spendthrift Provision**

No interest in the principal or income of this Trust shall be voluntarily or involuntarily transferable by any Beneficiary prior to actual receipt, and shall be exempt from claims of creditors to the fullest extent permitted by law.

**Article 9 – No Bond Required**

No bond or other security shall be required of any Trustee appointed under this Agreement.

**Article 10 – Trustee Compensation and Expenses**

Trustee shall be entitled to reasonable compensation for services rendered and reimbursement for all reasonable expenses incurred in the administration of the Trust.

**Article 11 – Miscellaneous Provisions**

a) Headings are for convenience only and shall not affect interpretation. b) If any provision is held invalid, the remainder of the Agreement shall remain valid. c) The Trust may be executed in counterparts, each shall be deemed an original. d) Notices shall be in writing and delivered personally, by certified mail, or recognized overnight courier.

**GRANTOR'S SIGNATURE**

**TRUSTEE'S SIGNATURE**

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

Original source of this document:

<https://docs-administrative.com/trust-document-template/>

Did you find this template helpful?

Find more updated templates at:

<https://docs-administrative.com/>

[View more templates](#)

This template is intended exclusively for personal, non-commercial use.  
If distributed or published, the source must be mentioned.

This template is provided for guidance only and does not constitute legal advice.  
It is recommended to consult a legal professional for each specific case.