



### Income-Only Trust (Miller Trust) Basic Package Questionnaire

<b>Name of person needing trust:</b> (ex. Jane A. Doe)				Male or Female:
Facility name (if one):				
Address:				
City:	St:	Zip:		
Telephone number:				
<b>Name of Trustee:</b> (ex. Jane A. Doe)				
<b>Relationship to customer:</b>				
Address:				
City:	St:	Zip:		
Primary number:				
Secondary number:				
Email address:				
<b>Name of successor (alternate/back-up) trustee</b> (ex. Jane A. Doe)				
<b>Relationship to customer:</b>				
Address:				
City:	St:	Zip:		
Primary number:				
Secondary number:				

**\*\*IMPORTANT NOTICE\*\***

By submitting this form and sending in payment to Montgomery & Associates, Inc. (DBA: ALTCS Planning.net) you are acknowledging and agreeing that you would like Carol Aragon-Montgomery<sup>1</sup> to prepare this Income-Only Trust (Miller Trust) and are acknowledging that you have read and understand this important notice. You are also agreeing that the IOT document created is for the person named on this form only and may not be reused, copied, modified or plagiarized in any form.

**The purpose of the Income-Only Trust (Miller Trust) is to become income-eligible for ALTCS only, not to prevent probate of assets. The trust is for the benefit of the customer until death. The State of AZ is the beneficiary of trust, thereafter. The trust document must be signed AND a new bank account established AND the new trust bank account must be funded with income.**

<sup>1</sup>Carol Aragon-Montgomery is a certified legal document preparer (#80427) and prepares legal documents. CAROL IS NOT AN ATTORNEY AT LAW AND IS NOT EMPLOYED BY ATTORNEYS AT LAW AND CANNOT GIVE LEGAL ADVICE. Your communications with Carol are kept CONFIDENTIAL, but since Carol is not an attorney at law, such communications are NOT PRIVILEGED (i.e., immune from Subpoena). Carol can give you general factual information pertaining to legal rights, procedures, or options available to you in a legal matter when you are not represented by an attorney. Carol cannot give you specific legal advice, opinions, or recommendations about your legal rights, remedies, defenses, options, or strategies.