



717 ATLANTIC AVENUE
SUITE 8D
BOSTON, MA 02111
PHONE (617) 423-9500
FAX (617) 507-1085

info@continental-trust.com

APPLICATION

BENEFICIARY

Beneficiary Name

First

Last

Beneficiary Phone

Beneficiary Email

Beneficiary Address

Street Address

Address Line 2

City

State

ZIP Code

Beneficiary Date of Birth



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Beneficiary Social Security Number

Guardian (if applicable)

Consultant Name

SETTLEMENT

Cash Amount

Annuity Amount

Settlement Details

- Work Compensation
- Liability
- Personal Injury
- Estate Planning
- Non-personal Injury

Benefits & Assistance

- Private Insurance
- Medicaid
- Medicare
- TriCare
- VA
- SSI
- SSDI
- Section-8 Housing
- Facility
- SNAP

FEATURES

- | | | |
|--------------------------------------|---|---|
| <input type="checkbox"/> SNT | <input type="checkbox"/> Home | <input type="checkbox"/> California |
| <input type="checkbox"/> Trigger | <input type="checkbox"/> Car | <input type="checkbox"/> Risk Tolerance |
| <input type="checkbox"/> Minor | <input type="checkbox"/> Van | <input type="checkbox"/> Treasuries |
| <input type="checkbox"/> Incompetent | <input type="checkbox"/> College Funding | <input type="checkbox"/> Municipalities |
| <input type="checkbox"/> Other | <input type="checkbox"/> Caregiver | <input type="checkbox"/> Corporates |
| | <input type="checkbox"/> Scheduled Payments | |
| | <input type="checkbox"/> True Link | |

Recommended Home Budget

The recommended home budget is 30% of the "Cash Amount"

Actual Home Budget

If the recommended home budget does not apply, include the actual home budget here.

Car Budget

\$48,000.00

Van Budget

\$100,000.00

Other Information



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Grantor Information

Grantor (Who is creating the trust?)

Self Parent Grandparent Guardian Court

Grantor Name

First

Last

Grantor Phone

Grantor Email

Grantor Address

Street Address

Address Line 2

City

State

ZIP Code

Grantor Date of Birth

Grantor Social Security Number



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Your Comments/Questions

A small, dark icon is located in the bottom right corner of the large rectangular comment box. It appears to be a stylized symbol, possibly representing a document or a specific function.