Form **CHAR001-LT**

**For Registration of Lead Trusts Only (remainder trusts use CHAR001-RT, charitable organizations use CHAR410, estates submit Notice of Probate)**

# Registration Statement for Charitable Lead Trusts

New York State Department of Law (Office of the Attorney General)
Charities Bureau - Registration Section
120 Broadway
New York, NY 10271
www.oag.state.ny.us/charities/charities.html

**Open to Public Inspection**

## Part A - Identification of Registrant

| | | | |
|---|---|---|---|
| 1. Full Name of Trust | | | 7. Full Name of Grantor/Testator |
| 2. c/o Name (individual, law firm, etc.) | | | 8. Fed. employer ID no. (EIN) |
| 3. Mailing address (Number and street) | | Room/suite | 9. Date of Trust and any Amendments/Codicils |
| City or town, state or country and ZIP+4 | | | 10. Type of Trust:<br>Inter vivos . . . . . ☐<br>Testamentary . . . . . ☐ |
| 4. Phone | 5. Fax | 6. Email address | 11. Fiscal Year End (mm/dd) |

## Part B - Identification of Trustees *(list information for each trustee)*

| Name | Address |
|---|---|
| | |
| | |
| | |

## Part C.1. - Identification of Remainder Beneficiaries *(list information for each remainder beneficiary)*

| Name | Date of Death (if applicable) | Description of Interest |
|---|---|---|
| | | |
| | | |
| | | |

## Part C.2. - Identification of Charitable Lead Beneficiaries *(list information for each charitable lead beneficiary)*

| Organization Name | Federal EIN | Lead Interest End Date | Description of Interest |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

## Part D - Attachments - All Documents Required

Attach a copy of the **trust instrument** to this Registration Statement.

## Part E - Certification

| Signature | Printed Name | Title | Date |
|---|---|---|---|
| | | | |