DE 1931
Commonwealth
TRUST COMPANY

Biography

INSTRUCTIONS: A brief biography should be completed by each individual who is establishing the trust or contributing funds to the trust, as well as any co-Trustees. The biography should address the following points:

- Place of birth, current residence, and other citizenship information
- Relevant family history, including family members
- Educational background
- Employment history, including current occupation/industry
- Source of wealth (please state explicitly how your wealth was acquired and the source of that wealth)
- Source of funding for the trust (please be as specific as possible)
  - If source of funding is an inheritance or a gift from another person, indicate who the inheritance or gift was from and how the deceased person or donor of the gift originally acquired his or her wealth
  - If source of funding is from investments, briefly describe the types of investments
  - If the trust will be holding an entity (ies), list each entity and its primary business purpose, including a diagram if the entity structure is layered or complex
  - If cash will be put into the trust, specify how the cash was acquired
- Any additional individuals or entities who may be contributing to the trust
- Ownership interests in any entities that are expected to contribute to the trust
- Primary purpose of the trust (i.e. is it a business trust, is it primarily for wealth management, etc.)
- Expected trust activity (i.e. will there be frequent wire transfers, will there be regular monthly distributions, or will the trust primarily remain dormant)

SAMPLE:

John Doe Biography

Mr. John Doe was born in Philadelphia, PA on January 1, 1964. He graduated with a BA in English from Haverford College in Haverford, PA in May 1986.

After college he went to work for Kraft Foods Corporation in Sales/Marketing in Philadelphia and New York. In 1991, he left and went to work on the floor of the New York Stock Exchange for Prestige Securities (his family's trading firm). In 1995 he moved to Maine and established an investment advisory firm, Mill Pond Advisors.

John married Jane Smith of Otisville, NY, on June 27, 1988. John and Jane Doe had their first son, Scott, on September 15, 1994 in New York City. On September 4, 1995 the Doe's purchased their home in Belfast, ME and then on April 17, 1997 had their second son, Jason.

John is very active with several non-profit organizations. He has served as Vice President for Florence Foster Jenkins Music Center in Belfast, and holds board memberships for the Penobscot Bay Foundation in Rockland, ME, and the Crime Prevention Association of Bucksport.

John's trust that will be funded with occupational earnings from his investment advisory firm and related investments, as well as an inheritance from his parents, Jim and Jean Doe, who acquired their wealth from ownership of the above-mentioned trading firm. The trust will be used to hold assets on behalf of John's beneficiaries, Scott and Jason. Occasionally distributions will be made from the trust to the beneficiaries for support and maintenance.