

Checklist: Post Estate Planning and Funding Your Revocable Living Trust

The following is a checklist of possible issues that would need to be addressed for purposes of effectuating your Revocable Living Trust. It is our recommendation that you consult with counsel for your specific needs. This list is generic and not intended to apply to every situation the following:

I. Forms

- Complete the trust form entitled “My Important Estate Planning Information” ([click here](#))
- Complete a form for memorial instructions. ([click here](#))

II. Document Storage

- Identify to immediate family where your Estate Planning documents will be located.
- Provide your Medical Power of Attorney, HIPPA forms, and Living Will to the designated agents.
- Make sure that friends and family know who prepared your estate planning, in the event documents are lost.

III. Funding (Consult with an Attorney to address any specific exceptions)

- Place title to all real estate into the name of your Trust.
- Transfer business ownership interest into your Trust.
- Transfer existing bank accounts are transferred to the Trust.
- Place the Trust as the beneficiary of your motor vehicle, or change title of your vehicle to the Trust. ([click here](#))
- Transfer non-qualified investment accounts are transferred into the name of the Trust.
- All qualified retirement accounts (IRAs, 401Ks, etc.) can leave your Trust as primary or secondary beneficiary.
- Leave your life insurance to your Trust as beneficiary.