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## **TRUST PACKAGE**

A “Trust Package” includes the preparation of the following documents:

1. Revocable Trust;
2. Certificate of Trust;
3. Funding Memorandum;
4. Last Will and Testament (“Pour-Over Will”);
5. Statutory Durable General Power of Attorney (“financial power of attorney”);
6. Medical Power of Attorney;
7. Directive to Physicians and Family or Surrogates;
8. Authorization to Release Medical Information (“HIPAA authorization form”);
9. Declaration of Guardian in the Event of Later Incapacity or Need of Guardian;
10. Warranty Deed (if necessary).

Additionally, your trust will only control the assets that have been transferred into it once the trust has been formed. It may be necessary to update your beneficiary designations on assets such as life insurance, 401k plans, IRAs, etc. once the trust has been signed, since your Trust will not control the distribution of these assets. The transfer of assets into the trust is called “funding” your trust, and is one of the most important factors in order to avoid probate. We will assist you with funding process once your trust has been signed. More specifically, we will identify the assets that need to be transferred into your trust and will assist in preparing deeds for real property, if necessary. Additionally, we will be available to coordinate your beneficiary designations with your investment or financial advisors, as needed.