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

After your trust is signed, it will control only those assets that have been re-titled in the name of your trust. For that reason, it may be necessary to update beneficiary designations on certain assets—such as life insurance policies, 401(k) plans, IRAs, and similar accounts—because your trust generally will not control how those assets are distributed. The process of transferring assets into your trust is called “funding” your trust, and proper funding is one of the most important steps in avoiding probate. We will assist you with the funding process after your trust has been signed by identifying which assets should be transferred into the trust and, if needed, preparing deeds for real property. We are also available to coordinate beneficiary designations with your investment or financial advisors, as appropriate.