

**LIVING TRUST ORGANIZER**

**INSTRUCTIONS:** Scan the **bold-face** items on this list. If any item applies to you, **circle** the number. When you are finished, you will have a list of what you must do before your living trust can be completed. As you complete each item, **check it off**.

- \_\_\_\_\_ 1. What is your **full legal name** and address? List any other names you've used. You will be the GRANTOR(S) (the ones to give property) to this trust.
- \_\_\_\_\_ 2. Note: Living Trusts are **notarized**. Please bring ID when you come to sign.
- \_\_\_\_\_ 3. Have you ever been **married**? Name(s) of all spouses, and whether you're presently married, divorced or widowed.
- \_\_\_\_\_ 4. Do you have any **children, step-children or adopted children**? If so, their names, birthdates, social security numbers and present addresses (bring whatever information you have).
- \_\_\_\_\_ 5. **What property are you granting to this trust?**
  - \_\_\_\_\_ a. If **real property**, bring a copy of the deed(s) containing the legal description.
  - \_\_\_\_\_ b. If **other property** (i.e. personal property), bring a list; if a bank or brokerage account, you will have to open a new account in the name of the Living Trust.
- \_\_\_\_\_ 6. Approximate **size of your estate**?
- \_\_\_\_\_ 7. Normally, one appoints himself, herself or themselves as trustee(s), the persons who will control the living trust. If you want to appoint **someone else as trustee**, their name and address. Will they be paid for their services, and if so, how much? Are there any **alternate trustees (who will serve with you now)**?
- \_\_\_\_\_ 8. Whom do you want to be **successor trustees**, the person(s) who assume management of your trust in the event you can no longer be the trustee because of death or disability?
- \_\_\_\_\_ 9. If you have **children under 18**, whom do you want to appoint as **guardian** in the event neither of you are able to care for them?
- \_\_\_\_\_ 10. After the death of the trustor or trustors, who are the **primary beneficiaries** (those who receive the estate)? **Secondary beneficiaries** (if the primary beneficiaries are predeceased)?
11. Often, a living trust is done **together with other estate planning documents**. Please indicate if you want us to prepare any of them. Separate checklists are being provided for the Will and the Advance Health Care Directive.
  - \_\_\_\_\_ a. **Will**, which disposes of specific assets and property not in the trust, can add additional assets to the trust, and which can also give your instructions for burial, cremation, etc.
  - \_\_\_\_\_ b. **An Advance Health Care Directive**, which gives another the power to make health care decisions for you if you are unable to make them yourself, and which may provide for the circumstance that your condition is terminal or you're in a coma, and that further medical measures would only prolong the life of the body (formerly contained in a living will).