

Trust Funding Instructions/Worksheet

Change of Ownership:

Asset	Action to be taken	Date Completed or N/A
Real Estate	<p>All deeds whether real property or minerals should be transferred to the trust name.</p> <p>Our office will complete any initial deed transfers (in CA). Please contact Shaw Legal Office if you purchase any new properties in the future.</p>	
Checking, Savings and Money Market Accounts	<p>Notify the Financial Institution to change the ownership on all accounts to your name as Trustee of your Trust.</p> <p>If an account cannot be titled in a trust for any reason, ask that the trust be named as a POD (Payable On Death) beneficiary on the accounts.</p>	
Brokerage Accounts	Change ownership to your name as Trustee of your Trust. Your broker can assist with this.	
Certificates of Deposit (CDs)	<p>Notify the Financial Institution to change ownership to the trust name.</p> <p>If the Financial Institution will not change ownership prior to maturity, ask that the trust be named as a POD beneficiary on the certificate. When the CD matures change the ownership to the trust.</p>	
Safe Deposit Box	Change the ownership to the trust.	
Savings Bonds	Have bank send bonds to Federal Reserve and change ownership to the trust name.	

Change of Beneficiary:

Asset	Action to be taken	Date Completed or N/A
<p>Retirement Accounts and Life Insurance</p> <p><i>Note: Never list a minor as beneficiary</i></p>	<p>If Married, your spouse is named as the Primary beneficiary and the Contingent beneficiary should be the trust.</p> <p>If Single, the trust can be the Primary beneficiary depending on your trust distributions, or if you want these accounts to go to specific individuals list their name(s) as Primary and Contingent beneficiaries.</p>	

Misc Changes:

	Action to be taken	Date Completed or N/A
Homeowner's Insurance on Real Estate	<p>Notify insurance agent to add trust name as an 'additional insured' on the policy (do not take your name off as insured).</p> <p><i>There is no need to contact your mortgage company.</i></p>	

**This is not intended as financial or tax advice, but a general recommendation. Please speak directly with your financial or tax advisor for a more in-depth analysis of your assets.*