

Brown & Streza



Sequence of Events Creating Your Documents and Funding Your Trust

Objectives: Your objectives in setting up a living trust are to control the distribution of your estate, avoid probate, avoid conservatorships and, to the extent possible, avoid taxes. If properly funded and treated, your revocable living trust will accomplish these objectives.

Step 1: The first step in accomplishing your objectives is for us to prepare your trust and all supporting documents based on our discussions. Once your trust documents are drafted, we will send you copies to review. If you have any questions regarding the drafts of your documents, please contact your Document Paralegal as noted in the letter you will receive with your documents. At your next appointment, we will discuss the documents and, if everything is in order, you will sign your trust and all other documents. Prior to your next appointment, you will be requested to complete the **Confidential Data Questionnaire** (CDQ) with the data required in order to assist you with the funding of your trust. If you have chosen to engage our Concierge Service to assist you with your funding, you will receive a follow up call from one of our staff members who will assist you in completing the CDQ.

Step 2: At your Signing Appointment you will sign the trust and all other documents. Once you have signed your trust, we begin the funding process. During the second half of your signing appointment, we will review your asset information, your life insurance and your retirement and/or pension plan information that you have provided in the CDQ. We will use this information for the preparation of deeds and assignments for the funding of your trust. We will also give you written instructions to be used in transferring the assets that only you are able to transfer. If you have chosen to engage our Concierge Service to assist you with your funding, a one of our staff members will work with our Funding Paralegal to assist you in transferring your assets into your trust and will prepare an in-depth review of your asset information, your life insurance and your retirement and/or pension plan information.

Step 3: Your third visit to our office will be approximately 60 days after you sign your trust documents. On your third visit, you will sign all required deeds and assignments. At that point, presuming you have changed your other assets in accordance with the written instructions which we gave you at your signing appointment, your revocable living trust will be fully funded and functioning. If you have chosen to engage our Concierge Service to assist with your funding, one of our staff members will present your in-depth review of your assets, your life insurance, and your retirement and/or pension plan information. At this time we will also discuss additional planning tools you may need in order to achieve your estate planning objectives.