Wealth Management
U.S. Bank

CHECKLIST

Trust planning checklist: How to prepare for your meeting

Topics to consider

You don't have to have everything decided before your first trust meeting, but you should think about the following questions:

- ☐ What do you want to leave in your trust?
- ☐ Who will these assets go to?
- ☐ What is the goal or purpose of this trust?
- ☐ What terms have you decided on for your trust?
- ☐ Who are you appointing as trustee or co-trustee?
- ☐ Who would you like to be your successor trustee?
- ☐ Will charitable giving be a part of your trust?

Documents to bring

Your attorney and trust administrator will advise you on what documents are needed to thoroughly plan and establish your trust, but here is a list of often-requested items:

- ☐ Will
- ☐ Power of attorney
- ☐ Healthcare directive
- ☐ List of assets
- ☐ Titles and deeds of property
- ☐ Stock certificates
- ☐ Life insurance policies