



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

Investment products and services are:

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