



## Gathering Information

**To prepare your revocable living trust, there is some information to gather and some decisions to consider.**

*Who can you trust to manage your money after you die? This person will be the “Successor Trustee.” This person will manage the assets for your children and make the distribution to the beneficiaries*

Wife (List 3 people)

Husband (List 3 people)

*If you become incapacitated (e.g. you are in a coma) and cannot make decisions about your health, who can make decisions on your behalf? This person will be assigned as “Durable Power of Attorney.”*

Wife (List 3 people)

Husband (List 3 people)



## **Documents Needed or List of Assets**

1. A copy of the deed to each of your real estate properties with the proper legal description.
2. A copy of a property tax statement. This will enable us to get correct assessors parcel numbers for each property.
3. Exhibit or Schedule "A" (all of your financial assets, including account numbers and location. Example - bank accounts, stocks, bonds, etc.) This has nothing to do with the legality of the Trust. It is to help your successor trustee locate your assets after you are gone. If you feel uncomfortable giving this information out, you may type or hand write this information out and keep it with your Trust. Remember, this information may change if you change bank accounts or buy and sell stock.
4. Information: the name of the County where your real estate is located, as well as a telephone number and mailing address for said County Recorder's Office.

## **LIST OF ASSETS**

I. Real Estate Property:

II. Investment & Bank Accounts:



III. Retirement Accounts:

IV. Life Insurance Policies:

V. Business Owned: