

Information to bring to estate planning meetings:

In order to fully implement your living trust, assets will need to be transferred to your trust. What you bring to the initial meeting depends on your individual portfolio, but we can review the individual statements from each asset you own to determine if it should be included. Here are some general asset categories to consider :

Bank Accounts:

- Checking
- Savings
- Money Market
- Certificate of Deposit (CD)

Retirement Accounts:

- Individual Retirement Accounts (IRA)
- 401K
- 403(b)
- Roth Individual Retirement Accounts (Roth IRA)

Stocks:

- Individually held stock certificates
- Bonds (Municipal or Corporate)
- Mutual Funds

Life Insurance:

- Individual term insurance
- Permanent or whole life insurance
- Annuities (Fixed or Variable)

Pensions:

- Employment pensions
- Retirement plans through employer

Real Estate:

- Grant Deed to each property address owned
- Deed of Trust

Business Entities:

- Corporations (C or S-Corp.)
- Limited Liability Companies (LLC)
- Partnership Agreements