



This checklist is a guide to help you review your trust draft. You do not need to turn this in; it is simply for your reference as you look over the summary and documents.

- Is your name spelled correctly?**
(the notary will verify this against your current ID)
- Are you happy with the name of your trust?**
(while personal choice varies, conventional names usually offer the most simplicity and clarity)
- Is the distribution of your assets explained properly?**
(confirm who will inherit and how they will inherit—including names, amounts, and percentages)
- Are your successor trustees structured properly?**
(confirm names and roles for those who will manage your estate after you become deceased)
- Are your power of attorney agents structured properly?**
(those who will manage your finances should you become incapacitated)
- Are your health care agents structured properly?**
(those who would make medical decisions for you should you be unable to do so)
- Are your medical decisions stated accurately?**
(confirm your end-of-life and organ donation preferences)
- Are your guardians set up properly?**
(if you have minor children, please review the information for those appointed to care for them)