

DRAFT REVIEW CHECKLIST

This checklist is optional—you do not need to turn it in. This is just a guide. Visit the “Client Resources” page of our website for more information and helpful videos.*

_____ **Is Your Name Spelled Correctly?** It doesn’t need to match every form of ID, but the notary will verify it against your ID. Full middle names aren’t required.

_____ **Are You Happy with the Name of Your Trust?** Living Trusts don’t offer guaranteed anonymity, so the simplicity and clarity of a conventional name usually outweigh any benefit of being creative or obscure. Still, it’s a personal choice.

_____ **Do We Have the Distribution of Your Assets Explained Properly?** There are two parts here: WHO will inherit and HOW they will inherit (e.g., at certain ages, over time, or outright). Please confirm that all names, amounts, and percentages are correct. Personal property (like cars and other tangible items) is usually listed later on a worksheet included in your final binder.

_____ **Do We Have Your Successor Trustees Structured Properly?** Please confirm names are spelled correctly and that roles (individually or as co-trustees) are correct. They will handle your estate after your death (similar to an “executor”) and may also assist your power of attorney agents if you become incapacitated.

_____ **Do We Have Your Power of Attorney Agents Structured Properly?** Please confirm their names are spelled correctly and that their roles (individually or as co-trustees) are correct. They will handle your financial affairs (banking, bills, taxes, etc.) should you become incapacitated.

_____ **Do We Have Your Health Care Agents Structured Properly?** Please confirm their names are spelled correctly and that their roles (individually or as co-trustees) are correct. They will handle your medical affairs should you become incapacitated.

_____ **Do We Have Your Medical Decisions Stated Accurately?** Confirm your end-of-life and organ donation information is accurate.

_____ **Do We Have Your Guardians Set Up Properly?** If you have minor children and we are appointing guardians for them in the event of your death, please review this information for accuracy.

**If everything looks good in the summary, let us know and we will get you a printed copy, organized in a binder, for final review and signing. Changes can always be made.*