

# LIVING TRUST BUNDLE SIGNING INSTRUCTIONS

*Follow these instructions to properly sign and notarize your living trust bundle. Visit the "Client Resources" page of our website for more information and helpful videos.*

## INSTRUCTIONS FOR THE ESSENTIALS BUNDLE

*You have The ESSENTIALS Bundle if it is in a ½-inch 3-ring binder with FIVE divider tabs. Instructions for signing The FOUNDATION and LEGACY Bundles begin on Page #3.*

### **Before You Begin Signing.**

- To keep these signing instructions concise, please refer to the coversheets behind each of the FIVE tabs for a detailed explanation of each of the following documents.
- THREE documents require notarization. For couples, all three of these documents are signed and notarized by both of you.
  - If you have a deed or any other documents you need to have notarized, refer to those documents for how many notarizations are needed.
- Most banks and credit unions provide free notarization services but prefer you to set up an appointment. Some AAA branches provide notarization services for free.

### **Tab #1: Introduction and Summary.**

- General information and summary. Nothing needs to be signed here.

### **Tab #2: Living Trust, Personal Property Gifts, and General Assignment.**

- This tab actually contains THREE documents:
  - First Document: The first document is the living trust. This document is all but a few pages behind this Tab #2. Date, sign, and notarize.
  - Second Document: This second document (still behind Tab #2) is immediately after the revocable living trust and is titled, "Personal Property Gifts." Read this document to learn more about its purpose

and how it works. Date and sign this document after filling it out, which can be at a later date. This document does NOT need to be notarized.

- Third Document: The final document behind Tab #2 is the “General Assignment.” Date, sign, and notarize.

### **Tab #3: Pourover Will(s).**

- If you are a couple, you have separate pourover wills, one located after the other separated by a divider sheet (both behind Tab #3).
- California law requires this document (and only this document) be witnessed (not notarized). Sign and witness using the following instructions.
  - Sign and witness your pourover will(s) with your trust or any day after.
  - You must sign and date your will in the presence of two witnesses, who must also sign, date, and fill in the county where noted.
  - Witnesses cannot be a spouse or beneficiary (primary or contingent). ANYONE ELSE over 18 years of age can be a witness.

### **Tab #4: Certification of Trust.**

- Handwrite the date on the blank line near the bottom of Page #1.
- Date, sign, and notarize on the last page.

### **Tab #5: Instructions for Transferring Assets Into Your Trust.**

- These are just instructions. Nothing needs to be signed here.

### **Quick Recap for the ESSENTIALS Bundle.**

- TAB #1: Information only. Nothing needs to be signed here.
- TAB #2: Three documents. The first and third ones need to be dated, signed, and notarized. The second is signed later if you decide to fill it out.
- Tab #3: Pourover will(s) need to be dated, signed, and WITNESSED. Don't forget to fill in the county where signed.
- Tab #4: The Certification of Trust needs to be dated, signed, and notarized. Also handwrite in the date near the bottom of Page 1 where noted.
- Tab #5: Information only. Nothing needs to be signed here.
- **WARNING:** Do not forget to sign any other documents included in your binder, including your deed. There will be separate instructions for each.

## INSTRUCTIONS FOR THE FOUNDATION AND LEGACY BUNDLES

You have The FOUNDATION Bundle if it is in a 1-inch 3-ring binder with TEN divider tabs.  
You have The LEGACY Bundle if it is in a 1½ -inch 3-ring binder with TWELVE divider tabs.

Instructions for signing The ESSENTIALS Bundle begin on Page #1.

### Before You Begin Signing.

- To keep these signing instructions concise, please refer to coversheets behind each of the TEN (or TWELVE) tabs for an explanation of each of the following documents.
- THREE documents require notarization. For couples, all three of these documents are signed and notarized by both of you.
  - If you have a deed or any other documents you need to have notarized, refer to those documents for how many notarizations are needed.
- Most banks and credit unions provide free notarization services but prefer you to set up an appointment. Some AAA branches provide notarization services for free.

**Tab #1: Introduction and Summary.** This tab contains general introductory information as well as a customized summary of your specific estate planning decisions. Nothing needs to be signed here.

### Tab #2: Living Trust, Personal Property Gifts, and General Assignment.

- This tab actually contains THREE documents:
  - First Document: The first document is the living trust. This document is all but a few pages behind this Tab #2. Date, sign, and notarize.
  - Second Document: This second document (still behind Tab #2) is immediately after the revocable living trust and is titled, "Personal Property Gifts." Read this document to learn more about its purpose and how it works. Date and sign this document after filling it out, which can be at a later date. This document does NOT need to be notarized.
  - Third Document: The final document behind Tab #2 is the "General Assignment." Date, sign, and notarize.

### TAB #3: Pourover Will(s).

- If you are a couple, you have separate pourover wills, one located after the other separated by a divider sheet (both behind Tab #3).

- California law requires this document (and only this document) be witnessed (not notarized). Sign and witness using the following instructions.
  - Sign and witness your pourover will(s) with your trust or any day after.
  - You must sign and date your will in the presence of two witnesses, who must also sign, date, and fill in the county where noted.
  - Witnesses cannot be a spouse or beneficiary (primary or contingent). ANYONE ELSE over 18 years of age can be a witness.

**Tab #4: Power(s) of Attorney.**

- If you are a couple, you have separate powers of attorney, one located after the other separated by a divider sheet (both behind Tab #3).
- Initial your power of attorney where noted on Page #5. Initials are not notarized, so feel free to initial Page #5 right now if you'd like.
- Date, sign, and notarize on the last page.

**Tab #5: Health Care Documents.**

- If you are a couple, you have separate Advance Health Care Directives, one located after the other separated by a divider sheet (both behind Tab #3).
  - Note that your "health care documents" consist of two documents: your advance health care directive, and immediately after is your HIPAA Authorization. So, for couples, both documents of one are followed by a divider sheet, which is then followed by both documents of the other.
- Initial your Advance Health Care Directive(s) where noted on Page #5. Initials are not notarized, so feel free to initial Page #5 right now if you'd like.
- Date, sign, and notarize your advance health care directive(s) on the last page.
- Date, sign, and notarize your HIPAA Authorization(s) on the last page.

**Tab #6: Certification of Trust.**

- Handwrite the date on the blank line near the bottom of Page #1.
- Date, sign, and notarize on the last page.

**Tab #7: Community Property Agreement (Couples Only).**

- This document is only required if there is community or joint property. If you are an individual, this tab is most likely empty.
- Date, sign, and notarize on the last page.

### **Tab #8: Assignment of Personal Property.**

- Date, sign, and notarize on the last page.

### **Tab #9: Final Memorial Instructions.**

- For couples, each will have their own, separated by a divider sheet.
- This document is optional. Sign and date but don't notarize. Again, optional.
- Date and sign on the last page. Do not notarize.

### **Tab #10: Instructions for Transferring Assets Into Your Trust.**

- These are just instructions. Nothing needs to be signed here.

## **Tabs #11 and #12 Are for The LEGACY Bundle Only**

### **Tab #11: Trust Administration Module.**

- This is a detailed resource module for your family and successor trustee to be used upon you becoming incapacitated or deceased. There is educational information, forms, and other resources. Nothing to be signed right now.

### **Tab #12: Lifetime Amendment Redemption Instructions.**

- This tab contains information about redeeming your free, unlimited, lifetime amendments. Nothing needs to be signed here.

### **Quick Recap for the FOUNDATION and LEGACY Bundles**

- Tabs #1, #10, (and #11 and #12 if applicable): Nothing to sign here.
- Tab #2: Three documents. The first and third ones need to be dated, signed, and notarized. Only date and sign the second once you fill it out later.
- Tab #3: Pourover Will(s): Date, sign, and have witnessed.
- Tab #4: Power(s) of Attorney: Initial (Page #5), date, sign, and notarize.
- Tab #5: Advance Health Care Directive(s): Initial (Page #5), date, sign, and notarize. HIPAA Authorization(s) need to be dated, signed, and notarized.
- Tab #6: Certification of Trust: Date (Page #1 and end), sign, and notarize.
- Tab #7: Community Property Agreement (couples): Date, sign, and notarize.
- Tab #8: Assignment of Personal Property: Date, sign, and notarize.
- Tab #9: Final Memorial Instructions (optional): Fill, date, and sign whenever you wish. Or replace with your own notes or documents.