

CHECKLIST: WHAT TO PREPARE FOR YOUR TRUST

This checklist applies to both individual and joint Trusts. For a joint Trust, please prepare information for both individuals. Sections on managing the Trust and distributing assets should be completed together

Basic Information

- ☐ Full legal names and initials
- ☐ Current address and relationship status (if applicable)
- ☐ Phone numbers and email addresses
- ☐ Dates of birth

Family and Loved Ones

- ☐ Names and details of any children (together or from prior relationships)
- ☐ Guardian preferences for children, if any
- ☐ Pet information if you want to make care arrangements

Healthcare Wishes

- ☐ Preferences for end-of-life care, pain management, and organ donation
- ☐ Notes or special instructions for your healthcare team

Healthcare Decision Makers

- ☐ Primary and backup healthcare agent name and contact information
- ☐ Any additional individuals who should or should not have access to your medical information

Financial and Estate Decision Makers

- ☐ Name(s) of the person(s) you trust to manage your finances and care
- ☐ Estate manager(s) and any backups or co-managers
- ☐ Contact info for each, if available
- ☐ Names of anyone you want to exclude

Managing Your Trust

- ☐ Name of the trust
- ☐ Successor trustee(s) and backup trustee(s)
- ☐ Instructions on how successor trustees should act (e.g., jointly or separately)

Distributing Your Assets

- ☐ Specific gifts (cash, property, or sentimental items)
- ☐ Names of people who should inherit what remains
- ☐ Backup plans if a beneficiary is no longer living

Final Arrangements

- ☐ Anyone you wish to exclude from your estate
- ☐ Last-resort beneficiaries in case others cannot inherit