

**Client Letter**  
**Doe Family Trust dated April 10, 2024**

It was created by you on **April 10, 2024**, You initially serve as your own Trustees

**Trust Name.** Proper funding of your trust generally requires transferring the title of your assets into the name of your trust. The name of your revocable living trust is **“Doe Family Trust dated April 10, 2024”**.

To transfer an asset into your Trust, you may title the asset name as follows:

**David A. Doe and Barbara A. Doe, or their successor[s], as Trustees of Doe Family Trust dated April 10, 2024.**

We recommend that you advise your successor trustee as to the location of this trust and ancillary documents. If the successor trustee does not have access to these documents it will be difficult for that person to carry out your wishes. We further recommend that copies of other documents, such as the health-care powers of attorney and the durable power of attorney, be provided to those persons who will have the responsibility pursuant to those documents. Remember that both of these documents have no expiration date on them. They will remain in effect until you revoke them. But, also remember that the Medical Power of Attorney does not take effect until your incapacity. Finally, a copy of your Medical Power of Attorney should be provided to your doctor.

**Real Estate:** [This may not apply to your home if you use a Ladybird Deed] In order to transfer real estate through your trust, you must title the property in the name of your revocable living trust. Electing not to transfer such a large asset will almost certainly result in that asset having to pass through probate. For each parcel of property you wish to transfer into your trust estate, a new deed must be prepared. As the attorney drafting your trust, we will also prepare your deeds. Title will only vest within your trust upon the recording of your new deed with the register of deeds in the county where the property is located.

**Insurance Policies, Keoghs, 401[K] and Profit Sharing Plans:** For each of these types of accounts that you own, your trust should be named as a contingent beneficiary, It will be necessary to contact the plan administrator for each in order to add your revocable living trust as the contingent beneficiary. In order to name your trust the contingent beneficiary, you may be able to complete the form provided by your plan administrators and mail it to the financial institution and immediately respond to any correspondence that they send you. Be certain to follow-up with your institution to make certain this is done properly. In order to transfer assets, administrators and / or financial institutions may request a review of your trust documents. Several original Certificates of Trust have been provided

**for this purpose. Upon request, you may also submit a copy [not an original] of your Certificate of Trust. You should NOT, however, provide anyone with your entire trust document. The information contained therein is personal and confidential.**

**Personal Property: Should you have a personal possession that you wish to transfer to someone intact after you are gone, it is imperative that you make a provision for it within your trust or in the accompanying Trustee Instructions. Failure to do so could result in the trustee selling that object in order to divide up your estate. Your trustee is also bound by the enumerated rights and duties your trust grants them to recognize and follow precise instructions for gifts and distributions.**

**Tax Issues: While your trust remains revocable, no tax documents need to be filed. Your trust uses your personal federal tax ID [Social Security Account Number].**

**Change is Constant: We recommend that you review your trust and other documents at least once per year. Your assets, your wishes as to your beneficiaries, who you name as a successor trustee, or who should make decisions if you become incapacitated. These factors are all variable. You may also change locations and the laws may change. Maintaining your trust requires updating it to reflect the ever-changing current state of events in your life.**

**Legal Documents: Several of the documents provided for you are:**

**Revocable Living Trust  
Bill of Sale  
Trustee Instructions  
Certificate of Trust  
Durable Power of Attorney  
Medical Power of Attorney  
Pour-Over Will  
HIPAA Authorization  
Statement of Wishes**



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