

# ARE YOU MISSING THIS VITAL ESTATE PLANNING STEP?

Creating a trust without properly funding it is like opening a checking account and never depositing your paychecks.

***Why do so many estate planners make this common mistake? Because properly funding a trust is hard work!***

- ✓ Both clients and lawyers forget to or avoid funding trusts due to the effort
- ✓ Getting financial institutions to retitle assets or update beneficiaries is difficult
- ✓ Although attorneys will provide a list of steps required to fund your trust, **most attorneys** will make you do it yourself



## ***Frustrating Facts***

- ✓ Financial Institutions like Vanguard require a 67-page form to retitle an account
- ✓ Stock Power forms ALWAYS require the extra step of a medallion guarantee
- ✓ The U.S. Treasury requires you to open an online account to transfer your bonds IN ADDITION to filling out a paper form

## ***Be Prepared***

- ✓ Each financial institution has their own paperwork, policies and rules
- ✓ You will likely have to jump through different hoops for banks, insurance companies and investment companies
- ✓ Don't assume that just because you filed the paperwork properly it will be done immediately– **following up is an essential step**

## ***Before You Hire an Estate Planning Attorney, Ask Them:***

- ✓ Does your firm facilitate trust funding?
- ✓ Will your firm perform the title transfers for my assets?
- ✓ Are you going to coordinate with my financial advisor during funding?
- ✓ Will you continue answering my phone calls and questions?
- ✓ What reassurance will you provide that my trust is properly funded?



## ***One of the Things That Makes the Law Offices of David L. Carrier Unique is Our Comprehensive Trust Funding Center***

*Other law firms will send you the "big scary memo" telling you to fund your trust or else. We do it **FOR YOU!***

## **Don't Let Inadequate Funding Make All Your Trust Efforts and Costs a Waste**

Contact the Law Offices of David L. Carrier and learn about our Trust Funding Center today!

**Call 616-361-8400!**



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