



This simple estate planning checklist will help you understand the steps you need to take to ensure that your trust will provide all of the necessary guidance for your loved ones after you are gone.

Many people want to control and direct how and where their assets end up after their death. But the truth is, in Arizona, if your assets exceed \$75,000 and you don't have a trust, it is highly likely that your estate will end up in Probate court. That means the courts – not you – will decide how to distribute your wealth. To avoid probate, you should consider establishing a revocable trust. That means three simple steps:

1. Hire a reputable and competent professional to establish your trust and have it notarized

- Be specific about how you want your assets to be distributed
- Ask questions with your estate planner and establish the best language to use to accurately convey your wishes
- Include as much detail as you would like. Remember, your specifics will make implementing your wishes much easier!

2. Select trustees and discuss with your trustees what you'd like to happen upon your death

- Choose people who you trust will follow your instructions
- Clearly review your wishes with them to avoid confusion
- Your trust, prepared by Evergreen Estate Planning, will have predesigned spaces for you to provide all the necessary information for your trustees right at their fingertips!

3. Fund your trust (the most important step after getting your trust set up).

That means you need to move assets into the trust, such as any asset that has a title:

- Vehicles and/or Boats
- Property Including Houses, Land, Commercial, etc.
- Bank Accounts
- Investment Accounts

To fund your trust, your Evergreen Estate Planning representative will help you every step of the way, advising you on how to fully fund your trust, and helping you understand how to add every single asset you want into to the trust, for the protection of your estate.

And when you pass, as part of your fee (and at NO cost to your trustees), we provide ongoing and detailed instruction to your trustees to ensure they have everything they need to enact your wishes.

When you have decided to move forward with establishing a trust, reach out to us at (480) 229-7192, we're here to help answer any questions you have.