BRYAN SCHURTER, INC.
Tax and Financial Advisor
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LIVING TRUST PREPARATION TO BRING LIST

DOCUMENTS NEEDED:

______ Copy of the Original Deed to your home, if applicable

______ Copy of your Property Tax Bill, if applicable

______ Copy of Original Deed & Property Tax Bills to any additional homes, if applicable

OPTIONAL ITEMS NEEDED:

______ Savings and/or Checking Account(s) Numbers

______ Life Insurance Company & Policy Numbers

______ Additional Investments (ie. stocks, mutual funds, 401(k), 403(b), IRA, Roth IRA) Company Names and Account Numbers

DECISIONS MADE ON THE FOLLOWING:

*It is **not** necessary to have made all these decisions before our appointment, but it is good to be considering these beforehand. Any and all questions will be answered in our initial appointment.*

______ Executor: person in charge of your trust when you pass away

______ Guardians for minor children, if applicable

______ Power of Attorney(s): who will make financial decisions for you if you are alive but unable to do so

______ Health Care Power of Attorney(s): who will make major health decisions for you if you are alive but unable to do so

______ Consider any possible *specific* gifts you would like to distribute to beneficiaries, charities, or anyone else, if applicable.

*BE SURE TO INCLUDE THE **LEGAL NAMES, ADDRESSES, AND PHONE NUMBERS OF THE PEOPLE LISTED ABOVE.**