

## Questions to Consider for your Living Trust

**1. Who would you like to be the Beneficiaries of your Trust?**

(person(s) designated to be the recipient(s) of your estate)

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

**2. Who would you like to be your Executor / Successor Trustee?**

(person(s) designated to carry out the provisions of your trust)

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

**3. Who would you like to be your Power of Attorney for Finances?**

(person(s) designated with full legal authority to handle your financial affairs)

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

**4. Who would you like to be your Power of Attorney for Health?**

(person(s) designated to follow your predetermined health care decisions)

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

**5. Who would you like to appoint as the Guardian(s) for your children?**

(person(s) legally appointed to care for your minor children)

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

**6. Who would you like to be your Ultimate Beneficiaries?**

(person(s) designated to receive your estate if all primary beneficiaries are deceased)

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

**7. Who would you like to give a Specific Asset or Cash Gift to?**

(specific asset or cash gift to an individual, institution or charity)

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

**8. Who would you like to give a Personal Property Item to?**

(jewelry, china, silverware, art, coin collection, etc.)

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

**PACIFIC COAST TRUST**

## Schedule of Assets

To create the List of Assets for your Living Trust, please provide the names of the Financial Institutions that hold the following items. Please, Do **NOT** include Account Numbers or Amounts:

**Accounts:**

Checking -	1. _____	2. _____	3. _____
Savings -	1. _____	2. _____	3. _____
Money Market -	1. _____	2. _____	3. _____
CD's -	1. _____	2. _____	3. _____
Brokerage -	1. _____	2. _____	3. _____
Stocks Held -	1. _____	2. _____	3. _____
Mutual Funds -	1. _____	2. _____	3. _____

**Retirement:**

IRA's -	1. _____	2. _____	3. _____
401K's	1. _____	2. _____	3. _____
TSA's	1. _____	2. _____	3. _____

**Life Insurance:**      1. \_\_\_\_\_      2. \_\_\_\_\_      3. \_\_\_\_\_

**Businesses:**

Sole Prop. -	1. _____	2. _____	3. _____
C-Corp -	1. _____	2. _____	3. _____
S-Corp -	1. _____	2. _____	3. _____
LLC -	1. _____	2. _____	3. _____
Partnership -	1. _____	2. _____	3. _____

**Promissory**

**Notes:**      1. \_\_\_\_\_      2. \_\_\_\_\_      3. \_\_\_\_\_  
(full legal name)

**Vehicles:**      1. \_\_\_\_\_      2. \_\_\_\_\_      3. \_\_\_\_\_  
(year/make/model)

**Grant Deeds:**      1. \_\_\_\_\_      2. \_\_\_\_\_      3. \_\_\_\_\_  
(we can usually provide these for you with the address or APN number)