

Funding Your Revocable Trust; Register for Seminar

Once you have executed your estate planning documents, you must fund your revocable trust to maximize its usefulness. A fully funded revocable trust is crucial if you become disabled. Upon your death, a properly funded trust will provide an orderly disposition of your estate and spare your loved ones time, expense, and the distress of the probate process.

Requirements

Generally, to transfer assets to your trust, you must execute new documents of title, deeds to real property, signature cards for your bank accounts, or change-of-beneficiary forms for pension plans, individual retirement plans, and life insurance.

For assets such as life insurance and retirement accounts, you will make beneficiary changes to properly distribute those assets upon death. The beneficiary will not necessarily be your revocable trust.

Please note that often forms ask for the "Date of Birth" of the beneficiary. When the trust is a beneficiary the date of birth is the date the trust was signed.

The Social Security number of the trust is its tax identification number, unless you are not acting as trustee.

Register for Seminar

Because trust funding involves many intricate legal steps, I am conducting a special, free seminar on the topic on March 22nd and again on April 5th, 2014. We will make the process more understandable and manageable for you. Please [click here](#) to register for the March seminar, and [click here](#) for the April seminar.

Sincerely,
Yahne



For more estate planning, special needs, and elder care information:

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I am honored to be re-elected President of Comité Tricolore, an organization supporting French culture and mutual interests between France and the US.



I am also looking forward to serving as a faculty member for the [Medicaid Planning Seminar](#) of the National Business Institute in Fairfax on February 26, 2014.

