

## TRUST CHECKLIST

- \* Trust
- \* Name Beneficiaries
- \* Trust Records
- \* Transferring Assets to Trust
- \* Electing Trustees
- \* Avoiding Probate
- \* Assets to Beneficiaries
- \* Modification of Trust
- \* Termination of Trust
- \* Additional Property to Trust
- \* Pour-Over Will
- \* Financial Directive
- \* Healthcare Directive
- \* Implications of Life Event Changes or Changes in Assets

This checklist is not a substitute for legal advice. If you have questions, then please consult a wills and trust attorney.

© 2011 Kate Willmore, 1407 33<sup>rd</sup> Street South, Saint Cloud, MN 56301  
Telephone: Please call (320) 217-6030 or e-mail [kaw@katewillmorelaw.com](mailto:kaw@katewillmorelaw.com)

Websites: [www.katewillmorelaw.com](http://www.katewillmorelaw.com) or [www.minnesotae-lawyerkatewillmore.com](http://www.minnesotae-lawyerkatewillmore.com)

Follow me for other articles of interest to MN citizens: Blog:  
[www.katewillmorelawblog.com](http://www.katewillmorelawblog.com) or on Facebook at Minnesotae-lawyer

