Wealth Management
U.S. Bank

CHECKLIST

Trust planning checklist: How to prepare for your meeting

Topics to consider

You don't have to have everything decided before your first trust meeting, but you should think about the following questions:

- [ ] What do you want to leave in your trust?
- [ ] Who will these assets go to?
- [ ] What is the goal or purpose of this trust?
- [ ] What terms have you decided on for your trust?
- [ ] Who are you appointing as trustee, or co-trustee?
- [ ] Who would you like to be your successor trustee?
- [ ] Will charitable giving be a part of your trust?

Documents to bring

Your attorney and U.S. Bank trust administrator will advise you on what documents are needed to thoroughly plan and establish your trust, but here is a list of often-requested items:

- [ ] Will
- [ ] Power of attorney
- [ ] Healthcare directive
- [ ] List of assets
- [ ] Titles and deeds of property
- [ ] Stock certificates
- [ ] Life insurance policies