

ARE YOU MISSING THIS VITAL ESTATE PLANNING STEP?

Creating a trust without properly funding it is like opening a checking account and never depositing your paychecks.

Why do so many estate planners make this common mistake? Because properly funding a trust is hard work!

- ✓ Both clients and lawyers forget to or avoid funding trusts due to the effort
- ✓ Getting financial institutions to retitle assets or update beneficiaries is difficult
- ✓ Although attorneys will provide a list of steps required to fund your trust, **most attorneys** will make you do it yourself



Frustrating Facts

- ✓ Financial Institutions like Vanguard require a 67-page form to retitle an account
- ✓ Stock Power forms ALWAYS require the extra step of a medallion guarantee
- ✓ The U.S. Treasury requires you to open an online account to transfer your bonds IN ADDITION to filling out a paper form

Be Prepared

- ✓ Each financial institution has their own paperwork, policies and rules
- ✓ You will likely have to jump through different hoops for banks, insurance companies and investment companies
- ✓ Don't assume that just because you filed the paperwork properly it will be done immediately- **following up is an essential step**

Before You Hire an Estate Planning Attorney, Ask Them:

- ✓ Does your firm facilitate trust funding?
- ✓ Will your firm perform the title transfers for my assets?
- ✓ Are you going to coordinate with my financial advisor during funding?
- ✓ Will you continue answering my phone calls and questions?
- ✓ What reassurance will you provide that my trust is properly funded?



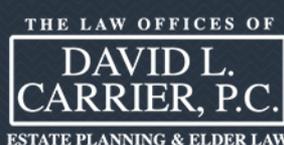
One of the Things That Makes the Law Offices of David L. Carrier Unique is Our Comprehensive Trust Funding Center

*Other law firms will send you the "big scary memo" telling you to fund your trust or else. We do it **FOR YOU!***

Don't Let Inadequate Funding Make All Your Trust Efforts and Costs a Waste

Contact the Law Offices of David L. Carrier and learn about our Trust Funding Center today!

Call 616-361-8400!



DAVIDCARRIERLAW.COM