

**Sample**

### Living Trust Review List

This review list is provided to inform you about this document in question and assist you in its preparation. This is a straightforward Living Trust which can be modified as you see fit. Your first action after setting it up is to transfer assets to it.

1. Make multiple copies. Give one to each signatory. Keep a copy in your home safe and another with the transaction file.
2. You can make this a Joint Living Trust by changing the language accordingly, to include your spouse.
3. You still need to make a will for many reasons, not the least of which is not all of your assets will be transferred into the trust, as a rule.
4. Remember to initial each page.