

WHAT SHOULD GO INTO MY TRUST?



PUT IN TRUST DURING MY LIFETIME

- Cash accounts (e.g., checking, savings, money market)
- Investment accounts
- Primary home
- Rental properties
- Cottages
- Personal effects (jewelry, keepsakes, etc.)
- Business interests (if allowed)
- Stocks and bonds
- Oil, gas, and mineral interests



DO NOT PUT IN TRUST DURING MY LIFETIME

(MAY BE ADVISABLE TO MAKE THE TRUST THE BENEFICIARY)

- Retirement accounts
- Life insurance policies
- Health Savings Accounts (HSAs)
- Everyday automobiles
- Joint cash account used for everyday expenses (if a married couple using individual trusts)

While these guidelines reflect common practices regarding which accounts and property are typically transferred to a trust and which are not, your individual circumstances may require a different approach. You should consult with your attorney and other qualified advisors before making any decisions about funding your trust.

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