

Basic Trust Package

Avoid probate, protect your privacy, and simplify how your estate passes to your loved ones.

Best for

- Homeowners and clients with significant assets
- Anyone who wants to avoid the probate process
- Married couples and blended families
- Clients who want more control over how and when assets are distributed

Not included in this package

- Advanced tax planning structures (credit-shelter trusts, SLATs, GRATs, etc.)
- Charitable planning provisions
- Business succession planning

Talk to your advisor if you think you may need additional documents. They can recommend the right package for your situation.

What you'll create

Document	What it does
Revocable Living Trust	Holds your assets during your lifetime and transfers them to your beneficiaries after death, without going through probate court.
Pour-Over Will	Captures any assets not titled in your trust at death and directs them into it, ensuring nothing is left unaddressed.
Certificate of Trust	A summary document that proves your trust exists, used when opening accounts or transferring property without sharing the full trust document.
Financial Power of Attorney	Names someone to manage your finances if you become incapacitated.
Healthcare Advance Directive	Documents your wishes for medical decisions if you're unable to communicate them yourself.
HIPAA Authorization	Grants your named person(s) access to your medical records and the ability to speak with your healthcare team.

What happens after?

Once you complete the online questionnaire, your documents are prepared and available to download within a few business days, or you can pay to have them printed and shipped directly to you. You'll then print them, sign in front of a notary in accordance with the requirements of your state, and return a copy to your advisor, who will keep them on file as part of your ongoing financial plan.

Estimated time to complete: Approximately 45–60 minutes.
Most appropriate if you have real property or want to avoid probate.