

Common Assets

FOR YOUR ESTATE PLAN



Funding your trust is the process of transferring ownership of your assets from you to your trust. To do this, you'll need to physically update the titles of some of your assets. Below is a list of common assets you might own that may need to be retitled into your trust.

Bank Accounts

- Checking*
- Savings*
- Certificate of Deposit

Business

- Closely Held Stock
- General Partnership Interest
- Patent or Trademark
- Professional Corporation
- Limited Liability Company
- Limited Partnership Interest
- Royalties
- Sole Proprietorship

Other

- Aircraft
- Automobile
- Boat
- Recreational Vehicle
- Government Security
- Judgment Asset
- Life Insurance Policy*
- Personal Property
- Promissory Note - Unsecured
- Employee Benefits
- Burial Plot
- Safe Deposit Box

Real Estate

- Real Property—Residential, Commercial, Land
- Mineral Rights
- Timeshare
- Promissory Note (secured by a deed of trust)

Retirement Accounts

- 401k*
- IRA/Roth IRA*
- Pension
- Profit-Sharing Education Savings Account
- 529 Plan
- UTMA*
- UGMA*

Health Savings Accounts

- HSA
- FSA

Brokerage Accounts

- Mutual Fund
- Margin Account
- Annuities/Perpetuities*

*This asset may not need to be retitled. Please seek the advice of your financial advisor.