



26632 Towne Centre Drive, Suite #300, Foothill Ranch, CA 92610
949-354-2323 | Hello@TrustLegalGroup.com
www.TrustLegalGroup.com

LIVING TRUST BUNDLE SIGNING INSTRUCTIONS

How to properly sign and notarize your living trust bundle

Follow these instructions to properly sign and notarize your living trust bundle. Visit the "Client Resources" page of our website for more information and helpful videos.

Instructions for the Essentials Bundle

You have the **Essentials Bundle** if it is in a ½-inch 3-ring binder with **five** divider tabs.

Instructions for the Foundation and Legacy Bundles begin on the next page.

Before You Begin Signing

- To keep these signing instructions concise, please refer to the coversheets behind each of the five tabs for a detailed explanation of each document.
- **Three documents require notarization.** For couples, all three are signed and notarized by both of you.
 - If you have a deed or any other documents you need notarized, refer to those documents for how many notarizations are needed.
- Most banks and credit unions provide free notarization services but prefer you to set up an appointment. Some AAA branches also provide notarization for free.

Tab #1: Introduction and Summary

General information and summary. Nothing needs to be signed here.

Tab #2: Living Trust, Personal Property Gifts, and General Assignment

This tab actually contains **three documents**:

- **First Document:** The living trust. This document is all but a few pages behind Tab #2. Date, sign, and notarize.
- **Second Document:** Immediately after the trust and titled "Personal Property Gifts." Read this document to learn more about its purpose and how it works. Date and sign this document after filling it out, which can be at a later date. This document does **not** need to be notarized.
- **Third Document:** The "General Assignment." Date, sign, and notarize.

Tab #3: Pourover Will(s)

- If you are a couple, you have separate pourover wills, one located after the other separated by a divider sheet.
- California law requires this document (and only this document) be **witnessed** (not notarized). Sign and witness using these instructions:
 - Sign and witness your pourover will(s) with your trust or any day after.
 - You must sign and date your will in the presence of two witnesses, who must also sign, date, and fill in the county where noted.
 - Witnesses cannot be a spouse or beneficiary (primary or contingent). Anyone else over 18 can be a witness.

Tab #4: Certification of Trust

- Handwrite the date on the blank line near the bottom of Page #1.
- Date, sign, and notarize on the last page.

Tab #5: Instructions for Transferring Assets Into Your Trust

These are just instructions. Nothing needs to be signed here.

Quick Recap for the Essentials Bundle

- **Tab #1:** Information only. Nothing to sign.
- **Tab #2:** Three documents. The first and third need to be dated, signed, and notarized. The second is signed later if you fill it out.
- **Tab #3:** Pourover will(s) need to be dated, signed, and witnessed. Don't forget to fill in the county where signed.
- **Tab #4:** Certification of Trust needs to be dated, signed, and notarized. Also handwrite in the date near the bottom of Page 1.

- **Tab #5:** Information only. Nothing to sign.

Warning: Do not forget to sign any other documents included in your binder, including your deed. There will be separate instructions for each.

Instructions for the Foundation and Legacy Bundles

You have the **Foundation Bundle** if it is in a 1-inch 3-ring binder with **ten** divider tabs.

You have the **Legacy Bundle** if it is in a 1½-inch 3-ring binder with **twelve** divider tabs.

Before You Begin Signing

- Please refer to the coversheets behind each tab for a detailed explanation of each document.
- **Three documents require notarization.** For couples, all three are signed and notarized by both of you.
 - If you have a deed or any other documents you need notarized, refer to those documents for how many notarizations are needed.
- Most banks and credit unions provide free notarization services but prefer you to set up an appointment. Some AAA branches also provide notarization for free.

Tab #1: Introduction and Summary

General introductory information and a customized summary of your estate planning decisions. Nothing needs to be signed here.

Tab #2: Living Trust, Personal Property Gifts, and General Assignment

This tab contains **three documents**:

- **First Document:** The living trust. Date, sign, and notarize.
- **Second Document:** "Personal Property Gifts." Date and sign after filling it out (can be at a later date). Does not need to be notarized.
- **Third Document:** "General Assignment." Date, sign, and notarize.

Tab #3: Pourover Will(s)

- If you are a couple, you have separate pourover wills separated by a divider sheet.
- California law requires this document be **witnessed** (not notarized):
 - Sign and witness your pourover will(s) with your trust or any day after.

- Sign and date in the presence of two witnesses, who must also sign, date, and fill in the county.
- Witnesses cannot be a spouse or beneficiary. Anyone else over 18 can be a witness.

Tab #4: Power(s) of Attorney

- If you are a couple, you have separate powers of attorney separated by a divider sheet.
- Initial where noted on Page #5. Initials are not notarized.
- Date, sign, and notarize on the last page.

Tab #5: Health Care Documents

- If you are a couple, you have separate Advance Health Care Directives separated by a divider sheet. Each set includes the directive and a HIPAA Authorization.
- Initial your Advance Health Care Directive(s) where noted on Page #5.
- Date, sign, and notarize your Advance Health Care Directive(s) on the last page.
- Date, sign, and notarize your HIPAA Authorization(s) on the last page.

Tab #6: Certification of Trust

- Handwrite the date on the blank line near the bottom of Page #1.
- Date, sign, and notarize on the last page.

Tab #7: Community Property Agreement (Couples Only)

- Only required if there is community or joint property. If you are an individual, this tab is most likely empty.
- Date, sign, and notarize on the last page.

Tab #8: Assignment of Personal Property

- Date, sign, and notarize on the last page.

Tab #9: Final Memorial Instructions

- For couples, each will have their own separated by a divider sheet.
- This document is optional. Date and sign on the last page. Do not notarize.

Tab #10: Instructions for Transferring Assets Into Your Trust

These are just instructions. Nothing needs to be signed here.

Tabs #11 and #12: Legacy Bundle Only

- **Tab #11: Trust Administration Module.** A detailed resource module for your family and successor trustee. Educational information, forms, and other resources. Nothing to sign.
- **Tab #12: Lifetime Amendment Redemption Instructions.** Information about redeeming your free, unlimited, lifetime amendments. Nothing to sign.

Quick Recap for the Foundation and Legacy Bundles

- **Tabs #1, #10** (and #11, #12 if applicable): Nothing to sign.
- **Tab #2:** Three documents. First and third: date, sign, and notarize. Second: date and sign when filled out.
- **Tab #3:** Pourover Will(s): Date, sign, and have witnessed.
- **Tab #4:** Power(s) of Attorney: Initial (Page #5), date, sign, and notarize.
- **Tab #5:** Advance Health Care Directive(s): Initial (Page #5), date, sign, and notarize. HIPAA Authorization(s): date, sign, and notarize.
- **Tab #6:** Certification of Trust: Date (Page #1 and end), sign, and notarize.
- **Tab #7:** Community Property Agreement (couples): Date, sign, and notarize.
- **Tab #8:** Assignment of Personal Property: Date, sign, and notarize.
- **Tab #9:** Final Memorial Instructions (optional): Fill, date, and sign whenever you wish.