

The
Revocable
Living Trust
Workbook

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PURPOSE OF THIS WORKBOOK

The purpose of this workbook is to assist you in assembling the important information needed to properly create and fund your Living Trust documents. The most important step in completing a Living Trust consists of placing your assets into it. This is referred to as “Funding” the trust. Assets that are NOT funded into your Living Trust will be subject to Probate. This process is not difficult to complete but it is the single most important step in the completion of your Trust.

This workbook will help you to assemble the details relating to your assets so that the funding process can be completed without intentional omissions. By following the easy steps outlined in this workbook you will complete this most important process assuring the most effective result from your Living Trust.

WHAT YOU NEED TO DO

There are essentially two types of Living Trusts. A Trust for a single person or AB Living Trust for a married couple. We have designed this workbook for all types of Living Trusts. Whether you are single or married fill out the information as it applies to your situation. The workbook is designed to be self explanatory.

It is very important that you fill out this workbook completely to assure the best results. Legibility, accuracy, and consistency of the information is most important. We urge you to give this workbook your close attention and be careful to check your information for accuracy before sending it to you're Living Trust preparer. Inaccurate or illegible information will delay or increase the chances of an improperly funded Living Trust. In this situation the details are important.

WHAT IS FUNDING THE TRUST?

Next to the decision to actually prepare a Living Trust, the most important step you will take is the funding or transferring of your assets into the Trust. This process involves the changing of titles of ownerships from your personal name into the name of the trust. You should also change most beneficiary designations on life insurance and IRA's, etc. to the Name of the Trust. The trustee, in most all cases, will be **you** acting as the trustee of your Living Trust.

Example: John H. Joe, Trustee.

WHO CONTROLS THE ASSETS IN MY TRUST?

The trustee you name for your Living Trust controls the assets in your trust. Most likely you have named yourself and your spouse, if applicable, as Trustees so you will still have complete control of your assets. One of the great features of a Revocable Living Trust is that you can continue to buy and sell assets just as you did before you formed your trust. You can also remove assets from your Living Trust at any time or even dissolve the trust if you wish.

WHY IS FUNDING MY TRUST SO IMPORTANT?

If you have signed your Living Trust document but haven't changed the titles and beneficiary designations on your assets, you have nothing more than an expensive Will. You may have a great trust, but until you transfer your assets into it, it doesn't control anything. If the goal of your Living Trust is to avoid probate at your death or court intervention at your incapacity, then you must fund it while you are living and able to do so. Hence the name "Living Trust".

WHAT HAPPENS IF I FORGET TO TRANSFER AN ASSET?

Your Living Trust contains a "Pour-Over Will" that serves as a safety net. This Pour-Over Will catches any forgotten assets and sends them into your trust, but not until that asset has first gone through the probate process. Once it has been "poured over" into the trust after probate it can be distributed to the heirs according to the instructions in your Living Trust.

WHO IS RESPONSIBLE FOR FUNDING MY LIVING TRUST?

You are ultimately and legally responsible for making sure all your appropriate assets are transferred into your trust. You have a lot of help available to you, so please don't hesitate to ask.

HOW DIFFICULT IS THE FUNDING PROCESS?

It's not difficult at all but it will take some time to complete. Because Living Trusts are now so widely used you should meet with little or no confusion when transferring your assets. For some assets, a short assignment document will be used. Other asset holders will require written instructions from you. Most transfers can be handled by mail or telephone.

Some instructions will want to see proof that your trust exists. To satisfy them, we have prepared what is called an "Abstract of Trust". This is the shortened version of your trust that verifies your trust's existence. It explains powers given to the trustee, and identifies the successor trustee, but it does not reveal any information about your assets or your beneficiaries and their inheritance.

Even though the funding process is not difficult, it can be easy to get side-tracked or procrastinate. To prevent this from happening, make funding your trust a priority and keep going until you are finished. Use this workbook to make a list of your assets, their values and locations; then start with your most valuable assets and work your way down. Remind yourself why you are doing this, and look forward to the peace of mind you will have when the funding of your Trust is complete.

WHAT ASSETS SHOULD I PUT IN MY TRUST?

The general rule is all of your assets should be in your trust. However, as we'll explain later, there are a few assets you may not want in your trust, or cannot be put into your Living Trust.

Generally, assets you do want in your trust include your , home, and other real estate, bank and savings account, stocks, bonds, investments, business interests and notes payable to you . You will also want to change most beneficiary designations to your trust so that those assets will flow into your trust and be included in your overall estate plan.

WILL PUTTING REAL ESTATE PROPERTY IN MY TRUST CAUSE ANY INCONVENIENCE?

In most cases, you will notice very little difference. You may even find it easy to transfer your home and other real estate to your Living Trust and to purchase new real estate in the name of your trust.

Because your Living Trust is revocable, transferring real estate to your trust should not disturb your current mortgage in any way. There should be no effect on your property taxes because the " transfer into trust" is not a sale and does not cause your property to be reassessed for property taxes. Also, having your home in your trust will have no effect on you being able to use the capital gains tax exemption.

SHOULD I PUT MY LIFE INSURANCE IN MY LIVING TRUST?

That depends on the size of your estate. If you are single and your net estate (assets minus debts), including the death benefits of your life insurance, is less than \$5 million per spouse (2014), or is you are married and your combined net estate is less than \$7 million; your estate will not have to pay estate taxes when you die. In this case, your Living Trust should be both the owner and beneficiary of your life insurance. This will give you, as trustee, maximum control over the policies and all life insurance death benefits can be distributed to your heirs according to your wishes expressed in the trust.

SHOULD MY LIVING TRUST OWN MY CARS?

Unless the car is valuable and substantially increases your estate value, you will probably not want it in your trust. The reason is, if you are at fault in an auto accident and the injured party sees that your car is owned by a Living Trust, they may think you have deep pockets and be more likely to sue you.

Every state allows a nominal amount of assets to transfer without probate. If the value of your car falls within this amount, you are probably okay when it comes to probate. Some states let you name a beneficiary for your car, which avoids probate and works well. Also, if your car is leased or heavily financed leave it out of the trust. Never transfer debt into your Living Trust.

WHAT ABOUT MY IRA AND OTHER TAX-DEFERRED PLANS?

You cannot change the ownership of these to your Living Trust. You can name your Living Trust as a beneficiary but be sure to consider all your options. These include your spouse, if you are married, your children, grandchildren, or other individuals; a trust; a charity, or a combination of the above.

The heirs you name as beneficiary of these plans will have a significant impact on the amount of the tax-deferred growth this money can continue to earn after you die. Consult your CPA for more in-depth information on this issue.

If you are married, your spouse is probably your best beneficiary because if you die first (1) the money would be readily available to your spouse and (2) gives you the personal rollover option, i.e. after you die, your spouse can roll-over your tax-deferred account into his/her own IRA and name a new beneficiary, preferably someone much younger, such as your children and / or grandchildren.

Anytime you name an individual as beneficiary, you lose control. After you die, the beneficiary can do whatever he or she wants with this money, including cashing out the account and destroying you're carefully made plans for long-term tax deferred growth. The money could also be available to creditors, spouses and ex-spouses. There is also the risk of court interference at your incapacity.

Naming a trust as beneficiary will give you maximum control over the money because the distributions will not be paid to an individual, but into a trust that contains your written wishes and instructions who will receive this money and when.

ARE THERE ANY ASSETS I SHOULD NOT PUT IN MY TRUST?

If you live in a non-community property state and have owned an asset jointly with your spouse since before 1976, transferring the asset to your Living Trust could cause your surviving spouse to pay more in capital gains taxes if she or she decides to sell the asset after you die.

If the asset is your personal residence, this would not be a problem unless the gain is more than \$650,000 for living married couples. But it could be a problem for other assets like farmland, commercial real estate or stocks. If this sounds like it could apply to your situation, check with your tax advisor before you change the title on those assets to your Living Trust.

Other assets that should not be transferred to your Living Trust are incentive stock options, Section 1244 stock and professional corporations.

WHAT ABOUT PROPERTY THAT DOESN'T HAVE A TITLE?

Personal property like artwork, antiques, collectibles, jewelry and furs, cameras, sporting equipment and books, gold and silver, and other personal household goods typically do not have a formal title. Your Living Trust contains an assignment to transfer personal property into your Living Trust.

WHAT IF I BUY NEW ASSETS AFTER I FUND MY TRUST?

Find out if you can take the title at purchase as trustee of your Living Trust. If not, transfer the title into Living Trust right away after you purchase it. If you are not sure how to transfer it, contact us and we will be glad to help you. This workbook contains transfer instructions for most types of assets.

WHAT ABOUT FUNDING OUT OF STATE PROPERTY?

If you own property in another state, transferring it to your Living Trust will prevent a conservatorship and/or probate in that state. You can contact a title company or an attorney in that state to handle the transfer for you. They will have a new deed or Quit Claim Deed showing your Living Trust as the owner of the property. The deed must then be recorded in the county where the property exists.

HOW TO TRANSFER ASSETS INTO YOUR LIVING TRUST

Real Estate:

If your property is financed with a mortgage, you need to re-deed the property into the name of your Living Trust. This can be done with a Quit Claim Deed that transfers only your equity into the Living Trust and leaves the mortgaged portion that is securing the loan undisturbed. As we mentioned earlier, this does not trigger the “due on sale clause” or create a reassessment for property taxes. In fact you usually don’t even have to notify your mortgage company of this type of actions. If you feel better checking with the mortgage company let them know that you are only placing the property into trust.

If your property is free and clear of any financial encumbrances or liens then we will prepare a new grant deed or trust deed or warranty deed done (whichever your state requires) placing the property into your Living Trust. The cost of this service should be nominal (\$150 to \$250). This cost is included and it covers only one property.

You will need to do this for each property you own regardless of its location. Heritage Living Trust and/or Monica Isabell Advisory Group will include one Quit Claim deeds at no additional costs with the preparation of your Living Trust. It is your responsibility to have the Quit Claim deeds notarized and filed in the county where the property is located. We will prepare additional Quit Claim Deeds , If needed, at a cost of \$75 per deed. If this service is desired, you must provide a legal property description for each property. The legal property description is found on the property deed or in the County Department of records in the county where the property is located.

The final step is to record the new deeds at the county recorders office in the county where the property is located. Once this is completed your properties are in your trust. Because you are the trustee you can take your property out of the Living Trust whenever you desire.

VEHICLES (automobiles, RV' s motorcycles):

Most sales make provisions for these transfers into trust through their department of motor vehicles. You can request the forms from your DMV.

The transfer of a motor vehicle is not always necessary if the vehicle has little value or is heavily encumbered. If you own a 1929 Bentley or a new Porche Turbo free and clear... by all means put them in the trust.

ALL OTHER MONETARY ASSETS:

Banking

Take your signed and notarized Living Trust to your bank and tell a bank officer that you have formed a Living Trust and want to change all your bank accounts and bank investments into the name of the trust. The banker will be familiar with this process. He will provide you with the necessary forms and will probably ask for a copy of the trust. Your Living Trust is a set of very private and personal documents. We do not advise you to provide the bank with a complete copy of your Living Trust. We have provided an “**Abstract of Trust**” in your document binder specifically for this purpose. It is signed and notarized by you and states that you have formed a Living Trust. This abstract should fully satisfy the banks requirements for a file copy.

STOCKS

If you own stocks you probably either own actual stock certificates issued to you or you are working through a stock brokerage firm and have a brokerage account in your name. In the latter case, you are not holding actual stock certificates. If you are holding stock certificates you need to contact the company that issued the certificates to you and notify them that you want to change your certificates into the name of your Living Trust. They will send you forms to accomplish this process and will require the return of the old certificates and probably ask for guaranteed signature on the forms. You can obtain a guaranteed signature at your bank. Take the form unsigned to your bank and sign it, as instructed, in front of a bank officer who will then certify the signature.

BONDS

The process for funding bonds into your Living Trust is very much like funding stocks. Contact the company. They will advise you of their procedures for changing title of ownership into the name of the trust.

BUSINESS INTERESTS

Business interests can consist of stock ownership in a corporation, membership interest in a LLC, or ownership in a company under your name such as a partnership or sole proprietorship. In each of these cases you should change the mode of ownership or participation into the name of the Living Trust. This would involve reissue of stock in a corporation, change of membership vesting on an LLC or amendments to a partnership agreement. Sole proprietorship business interests should be treated like personal property and listed in the Schedules section of your Living Trust.

PERSONAL PROPERTY

Personal property includes all the stuff you own that doesn't have a public title registration of some kind. We are talking about such things as cash, coins, precious coins, collections and collectibles, antiques, personal jewelry, furniture, clothing, books and so forth. Transferring such items to your living Trust is extremely fast. Secondly, your trust contains a section called " Schedule A" and that section is there specifically for you to list your assets. It is an inventory of everything that you possess. It shows and demonstrates your legal intention to place all the listed assets into the trust. Legal intent is important and we suggest that you actually list your assets in the schedules section.

COMPLETING THE WORKBOOK

Completing the workbook will simplify the funding process tremendously and assure that you won't forget to fund all of your assets. Providing us with this information will help us to support your Living Trust by alerting us to estate planning issues that are unique to you that may need attention. A Living Trust is the cornerstone of every estate plan.

You are laying a strong foundation for all other estate planning strategies you may employ later.

As we mentioned earlier, assemble all documentation relative to your assets so that you can conveniently enter them into this workbook. Be thorough in your entries and the result will be a valuable snapshot of your financial life and a strong backup system that will add strength to your estate plan.

CONFIDENTIALITY

All information in the workbook relating to your Living Trust is extremely confidential. We do not share this information with anyone and we do not sell or share our clients file with anyone.

**LIST OF THINGS NEEDED
TO INCLUDE IN YOUR LIVING TRUST**

- Your Personal information and your Spouse's information, if applicable (Date of birth, SSN, etc)
- Beneficiaries Full Names, Date of Birth Relation, Percentage of the estate each person shall receive.
- Successor Trustee's Names, addresses and phone numbers.
You can have more than one person to be the Successor Trustee of your Trust.
- Name of Person(s) you would consider to be your Power of Attorney for Health Care and Asset Management. You can list more than one person. Name, address, phone number needed.
- List the name of your Banks, Brokerage Accounts, Investments, etc, address, account numbers and type of accounts.
- For Real Estate – Please provide us with
 - ✓ Property Address
 - ✓ Copy of Tax Bill
 - ✓ Copy of Deeds – if available
- Collections and Collectible items:
 - Please describe what it is and the approximate value.
- Automobiles
 - VIN Number
 - Year, Make and Model of Vehicle(s)
 - Approximate Value
- List any specific monetary bequests or special instructions, comments and information that you require to be incorporated in your Trust.*

LIVING TRUST WORKSHEET

Please Print or Write Clearly To Prevent Spelling Errors In Your Trust Documents

TRUST NAME: _____ **FAMILY TRUST**

Full Name: _____ **Date of Birth:** _____

U.S. Citizen: ___ Yes / ___ No Social Security Number: _____

Spouse's Name: _____ **Date of Birth:** _____

U.S. Citizen: ___ Yes / ___ No Social Security Number: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Home Phone: _____ Cell Phone: _____

Email Address: _____

BENEFICIARIES

Full (Legal) NAME	Relationship	Date of Birth	% Percentage

If a beneficiary predeceases you, his or her share is to be:

- _____ Divided equally among his or her children of issue, if any, or
 _____ Divided among the remaining beneficiaries named above in the proportions indicated.

If all the beneficiaries predecease you, and only their children or other issue are living, do you want the trust divided equally among all of the children to the above beneficiaries? Yes No

Should adopted children be treated as a natural issue? Yes No

Should step-children be treated as a natural issue? Yes No

Does any of your beneficiaries have any health concerns you would like to consider? Yes No

Successor Trustee (s)

The Successor Trustee is the person responsible for carrying out the instructions as it is written in your Living Trust Documents. They are responsible for contacting and reaching out to the beneficiary(ies) listed in the trust and providing them copies of the Trust. The trustee will be responsible for settling the trust by distributing the assets, selling the property, filing taxes, maintaining the estate, etc..

First Successor Trustee:

Address: _____ City: _____ St: _____ Zip Code _____

Phone Number: _____ Cell Phone: _____

Second Successor Trustee: _____

Address: _____ City: _____ St: _____ Zip Code _____

Phone Number: _____ Cell Phone: _____

The above to serve in order

The above to serve Together

Power of Attorney – Health Care / Asset Management

The Power of Attorney for Asset Management is the person responsible for handling your financial affairs in the event you are unable to due to being out of town, incapacitated, diminished capacity, etc. The Power of Attorney will sign your documents accordingly on your behalf in your best interest.

The Power of Attorney for Health Care will be able to make healthcare decisions for you on your behalf in the event decisions need to be made regarding your health. You can have more than one person act as power of attorney.

Power of Attorney for Asset Management

Name: _____ (1st)

Address: _____ City: _____ St: _____ Zip Code _____

Phone Number: _____ Cell Phone: _____

Name: _____ (Alternate)

Address: _____ City: _____ St: _____ Zip Code _____

Phone Number: _____ Cell Phone: _____

Power of Attorney for Health Care

Name: _____ (1st)

Address: _____ City: _____ St: _____ Zip Code _____

Phone Number: _____ Cell Phone: _____

Name: _____ (Alternate)

Address: _____ City: _____ St: _____ Zip Code _____

Phone Number: _____ Cell Phone: _____

Advanced Health Care Declaration / HIPAA Authorization

The **Advanced Health Care Directive** is a detailed description of the type of care you would like to receive if you were in a terminal condition or if you are undergoing an operation. Most health facilities will ask you to sign a Health Care directive to have on file. Please indicate below who will be appointed to carry out your wishes.

Life Support Decisions

If you are in a terminal condition or vegetative state, do you want your life-support systems to be:
____ Terminated or ____ Used to Maintain your life.

1st Appointee: Name: _____
Address: _____ City: _____ St: _____ Zip Code _____
Phone Number: _____

2nd Appointee: Name: _____
Address: _____ City: _____ St: _____ Zip Code _____
Phone Number: _____

The **HIPAA Authorization** will give permission to whom you designate to obtain medical records and other personal health records on your behalf. Please specify who will have access.
Same as Above? Yes No If no, please list names below.

1st Appointee: Name: _____
Relationship: _____ Phone Number: _____

2nd Appointee: Name: _____
Relationship: _____ Phone Number: _____

Final Disposition Instructions

The Final Disposition Instructions will allow the person named below to make funeral arrangements on your behalf, according to your instructions. Also, list any insurance policies you may have in place that will cover the cost of the funeral, if any.

Have you made any Pre-Need Plans? Yes No
If yes, Name of Insurance _____ Policy # _____

Do you wish to be Cremated Buried Other _____

1st Appointee: Name: _____
Relationship: _____ Phone Number: _____

2nd Appointee: Name: _____
Relationship: _____ Phone Number: _____

Real Estate Information

Please list the address(es) of all your real property that you would like to have moved into Trust.

Property Address: _____

City: _____ State: _____ - Zip Code: _____

APN Number: _____

Attach Deed or legal Description

Property Address: _____

City: _____ State: _____ - Zip Code: _____

APN Number: _____

Attach Deed or legal Description

Property Address: _____

City: _____ State: _____ - Zip Code: _____

APN Number: _____

Attach Deed or legal Description

Property Address: _____

City: _____ State: _____ - Zip Code: _____

APN Number: _____

Attach Deed or legal Description

Insurance Policies / Annuities / 401k / Pension

Name of Insurance Company _____

Address: _____ City: _____ State: _____ Zip Code _____

Policy # _____ Policy Type: _____ Value:\$ _____

Name of Insurance Company _____

Address: _____ City: _____ State: _____ Zip Code _____

Policy # _____ Policy Type: _____ Value:\$ _____

Bank Account Information

Name and Address of Bank	Type of Account	Account Number
Name: _____ Address: _____ City, St Zip Code: _____	<input type="checkbox"/> Checking <input type="checkbox"/> Savings <input type="checkbox"/> Money Market <input type="checkbox"/> CD	Account # _____ Account # _____ Account # _____ Account # _____
Name: _____ Address: _____ City, St Zip Code: _____	<input type="checkbox"/> Checking <input type="checkbox"/> Savings <input type="checkbox"/> Money Market <input type="checkbox"/> CD	Account # _____ Account # _____ Account # _____ Account # _____
Name: _____ Address: _____ City, St Zip Code: _____	<input type="checkbox"/> Checking <input type="checkbox"/> Savings <input type="checkbox"/> Money Market <input type="checkbox"/> CD	Account # _____ Account # _____ Account # _____ Account # _____
Name: _____ Address: _____ City, St Zip Code: _____	<input type="checkbox"/> Checking <input type="checkbox"/> Savings <input type="checkbox"/> Money Market <input type="checkbox"/> CD	Account # _____ Account # _____ Account # _____ Account # _____

Other Assets

Company Name	Type of Investment	Policy / Account Number	Value

Gift / Bequests

List Any Specific monetary bequests or special instructions below:

(A gift can be made to anyone, your church, friends, relatives, etc.)

Name of Recipient	Gift	Amount / Value

NOTES & ADDITIONAL INFORMATION

Additional Comments, Information or Instructions:

Notes: _____

Notes: _____

Notes: _____

Notes: _____

NOTES & ADDITIONAL INFORMATION

Additional Comments, Information or Instructions:

Declaration of Trust

(For California Residents only)

I / We certify that the information contained in this instrument indicates my / our intention to create a trust as required by California Probate Code 15201, and that is indeed a Declaration of Trust, and that the assets listed herein are hereby declared to be assets in the trust. All real property is hereby conveyed to the trustee of the trust in conformance with California Probate Code 15200(b) and 15206(b), and personal property, whether listed in this document or not, is declared to be hereby assigned to the trustee of the trust as assets of the trust. Trustees, Successor Trustees, and beneficiaries of the trust are named herein. It is my / our intent that the trust herein created will be further memorialized, but in the event of my/our incapacity or death, I /we hereby authorize those who would serve as trustee had the memorialized documents been previously executed to cause those instruments to be created and to execute them in my/our stead, unless this declaration is, prior to that time, revoked by me/us in writing. Trustee is authorized, if necessary, to petition the court for approval of the transfer of the real and personal property herein described to the trust per Probate Code 850(a)(3).

Settlor /Trustee

Date

Settlor / Trustee

Date

NEXT STEPS

IF YOU WOULD LIKE TO GET STARTED WITH THE PROCESS,
YOU CAN CALL TO SET AN APPOINTMENT.

MAIL, EMAIL, FAX OR SCAN THE LIVING TRUST WORKSHEET TO

EMAIL / SCAN: monica.isabell@outlook.com

MAIL: 1976 S. La Cienega Blvd, Suite 540,
Los Angeles, CA 90035

FAX: (323) 983-7405

CALL FOR AN APPOINTMENT: (323) 974-6322

OFFICE: **MONICA ISABELL ADVISORY GROUP**
444 Washington Blvd
Marina del Rey, CA 90292

Be sure to have copies of your real estate deeds, and have the worksheet filled out as much as possible.

If there are any questions, please be sure to call.

THE COMPLETE REVOCABLE LIVING TRUST

Living Trust – SINGLE \$ 995 \$ _____
 Living Trust – COUPLE \$ 1495 \$ _____

Included in Complete Living Trust:

- Declaration of Trust
- Certificate and Abstract of Trust
- Pour-Over Will
- Advance Directive & HIPAA
- Schedule A – List of Assets
- Power of Attorney(s) Asset Management
- Power of Attorney(s) Health Care
- Deed Preparation Only (1 Property)

_____ Additional Property Trust Transfer Deeds # of Deeds _____ x \$75 \$ _____
 _____ Affidavit of Death preparation: (\$50 per Affidavit) x _____ \$ _____
 _____ Special Needs Trust: \$350.00 \$ _____
 _____ **Rush / Expedited Services**.....add \$ 250.00 \$ _____

TOTAL: \$ _____
Amount Paid: \$ _____
BALANCE DUE: \$ _____

CHECK * CASH * CASHIERS CHECK * VISA * MASTERCARD * PAYPAL *
ZELLE: (323)974-6322 * CASHAPP \$Monicalsabell

Agreement & Disclosure Notice

1. **Monica Isabell Advisory Group** representatives and agents are not attorney's or Certified Public Accountants, and cannot give legal advice. We will provide you with the Living Trust documents based on the information you provided us. Any omission cannot result in liability to Monica Isabell Advisory Group. I / We understand that property, and assets not placed or transferred to the trust may be subject to probate and federal estate taxes in the event of a death.
2. This agreement may be rescinded in writing within 3 business days from this day and receive full reimbursement.
3. A Revocable Living Trust does not alter or reduce personal income tax.
4. **Monica Isabell Advisory Group** will correct any errors in our Trust documents without charge, unless such errors resulted from inaccurate information supplied by client.
5. Client is responsible for Recording their own Grant Deeds, Trust Transfer Deeds, Affidavits, and any other documents that needs to recorded as it pertains to the funding of the trust.

Make Checks payable to **Monica Isabell Advisory Group**” or **“Monica Isabell”**

Client: _____ Date: _____

Client: _____ Date: _____