INTEGRITY LAW
Wills & Trusts

Utah Trust Funding Checklist

A free resource *always consult your attorney before making any changes

Real Estate
- Primary residence
- Vacation home
- Rental property
- Timeshares

Bank Accounts
- Checking
- Savings
- Money market
- CDs (if appropriate)

Investment Accounts
- Brokerage accounts
- Non-qualified investment accounts

Business Interests
- LLC membership interests
- Closely held corporation shares (if appropriate)

Personal Property
- Review assignment of personal property
- Valuable collections

Beneficiary Designations to Review
- Life insurance
- IRAs
- 401(k)s
- HSAs

Note: Beneficiary designations often should not simply be changed to the trust without legal and tax advice.

Other Important Steps
- Store originals securely
- Tell your successor trustee where documents are kept
- Review your plan every 3–5 years or after major life events

Need Help?
Call Integrity Law in Tooele, Utah to schedule a consultation.
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