

Procedures After Death, for a Successor Trustee

Personal Property Memorandum

The provisions of your living trust provide that your personal effects will be first distributed according to any specific written instructions you have written on a separate memorandum for disposition of such property. We have prepared and included in this section as part of your living trust plan a form which may be used by you for such distribution.

This form allows you to leave specific personal property to specific beneficiaries without having to go to the time and legal expense of changing your will or amending your living trust.

Other

This section contains important personal information. One should list here the names, addresses and phone numbers of family members, friends and beneficiaries of your living trust, as well as important advisors that you believe your Trustee may need to contact.

Provide, if you wish, personal guidelines to your Trustee about how to deal with a particular beneficiary, etc.

This is also the place to record your “digital assets”; i.e. user names and passwords for online purchase, bill paying, investment, banking, social networking or email accounts, or domain names and webhosting accounts you own. Many online companies and websites are either unable or unwilling to grant access to anyone but the account holder. It is important to leave a means of gaining access to your accounts, if you are unable to do so personally.

You may also wish to write a personal note about your personal religious beliefs, a history of how you acquired your wealth or your hopes for your future legacy.

This section also contains a list of advanced estate planning strategies that you may want to consider.

There are forms to use to identify the location of important personal documents. You should copy the form if you need additional pages.

Online Accounts and Digital Assets

Service	Username	Password
Banking		
Billpaying		
Investments		
Shopping		
Email		
Photo and Video		
Movies and Music		
Insurance		
PayPal		
News Subscriptions		
Instant Messaging		
Domain Name		
Website		
Computer Administration		

Service	Username	Password