



Done	Task:
<input type="checkbox"/>	<b>IMMEDIATE ATTENTION:</b> Funding your Trust – please refer to your Asset Table in the Funding Instructions section of your estate-planning portfolio. The recommendations column in the asset table will advise you on changing title (ownership) and/or updating your beneficiaries. <i>If you would like us to assist you with funding, please let us know and you may retain us for this additional service.</i>
<input type="checkbox"/>	Add copies of your account statements reflecting the name of the Trust as owner, as well as any Beneficiary Designation forms, to your estate planning-portfolio in the Trust Assets section.
<input type="checkbox"/>	Inform your named Personal Representative(s) and successor Trustee(s) where your estate planning portfolio is stored and provide combination(s)/key(s)/location of key(s), if applicable. <i>It is <u>not</u> recommended that you store your estate-planning portfolio in a bank's safe deposit box.</i>
<input type="checkbox"/>	Based on your comfort level, consider providing copies of the estate planning documents to those you have named to serve in the various roles. We also encourage you to provide your Health Care Proxy and HIPAA Authorization to your primary care physician and other medical providers.
<input type="checkbox"/>	<b>Review &amp; complete the following documents in your estate-planning portfolio(s):</b>
<input type="checkbox"/>	<b>IMMEDIATE ATTENTION:</b> If you conveyed real estate by deed to your Trust, add the Trust as an additional insured on your homeowner's insurance policy– complete and mail in the template letter provided to you. Once you receive the Verification from the company, add to the Trust Assets section of your estate-planning portfolio with your Deed.
	NOTE: If, as part of your plan, we conveyed real estate by deed to your Trust, your original, recorded Deed, Trustee Certificate, and Declaration of Homestead are in the plastic sheet protector in your Trust Assets section of your estate-planning portfolio. Your documents have been recorded electronically. <b>IF YOU RECEIVE A LETTER IN THE MAIL FROM A COMPANY OFFERING TO OBTAIN A COPY OF YOUR DEED FOR A FEE - DO <u>NOT</u> REPLY TO THEM OR SEND THEM MONEY TO OBTAIN A COPY. <u>THIS IS A SCAM.</u></b>
<input type="checkbox"/>	<b>IMMEDIATE ATTENTION:</b> If you conveyed a condominium unit by deed to your Trust, contact your homeowner's association about having them update their Master Insurance Policy to reflect your Trust as an additional insured.
<input type="checkbox"/>	Funeral Arrangements (also discuss your wishes with your family and/or send them a copy of this completed form);
<input type="checkbox"/>	Personal Property Memorandum(s);
<input type="checkbox"/>	Letter(s) of Instruction to your Health Care Agent(s);
<input type="checkbox"/>	Letter of Instructions to Guardians and Trustees (if you have minor children);
<input type="checkbox"/>	Key Advisors;
<input type="checkbox"/>	Document Finder/Location Lists;
<input type="checkbox"/>	Personal Family and Legacy



Done?	Task:
<input type="checkbox"/>	Reapply for your residential property tax exemption, if applicable.
	<p>Many cities provide a residential property tax exemption. If you live in such a city, you will be contacted at some point by the city to reapply for the exemption as you have changed ownership in your home to your Trust. The city will request a new application and several other documents (generally - page 1 of your last income tax return(s); a copy of the Trustee Certificate recorded with the Registry of Deeds; and Schedule of Beneficiaries (which you do not have; you will likely need to provide a full copy of your trust or the specific section of the Trust that reflects you as current beneficiary(ies)). When the time comes, please do not hesitate to contact Eckert Byrne LLC in the event you have any questions on what the city is requesting, since we deal with this all the time.</p>
<input type="checkbox"/>	Contact your bank and financial institutions to confirm they will accept your General Durable Power of Attorney, or to request and complete the bank-issued power of attorney. This will ensure there are no issues for your attorney-in-fact in the future. Keep a copy of the bank's power of attorney in your Power of Attorney section of your estate-planning portfolio.
<input type="checkbox"/>	<b>Conduct a digital asset "fire drill" and prepare an inventory of your digital assets.</b>
<input type="checkbox"/>	Pretend you have a complete loss of access to all computers, smartphones, tablets, etc. - How would you obtain access to your digital assets (of financial or sentimental value)? How would your loved ones access your digital assets? Do you have an inventory of your digital assets?
<input type="checkbox"/>	Over the next month, slowly start to inventory all of your digital assets (digital devices like smartphones and computers, data-storage devices, electronically stored data - online financial records, cloud storage, local storage - user accounts, domain names, intellectual property in electronic format, etc.). Ensure your loved ones <i>know</i> what digital assets you have, and <i>how</i> to access them.
<input type="checkbox"/>	Share copies of any completed documents above to Eckert Byrne LLC (via secure share-file, mail, or encrypted email).