



Funding Reference Checklist

To maximize the value of your Trust, you should make efforts to transfer your assets into your Trust.

Titles:

- Checking Accounts
- Money Market Accounts
- Savings Accounts
- Ed Vest Accounts (529 Plans)
- Certificates of Deposit
- Safe Deposit Boxes
- Securities
- Stocks
- Bonds
- Mutual Funds
- Brokerage Accounts
- Real Estate
- Insurance
- Vehicles
- Business Interests

Beneficiaries Designations:

- Life Insurance Policies
- IRAs
- Annuities
- 401(k)
- 403(b)
- Keogh Accounts
- Other Retirement Accounts