

Common Assets Checklist

Funding your trust means making sure your assets are titled the right way.

In most cases, that involves transferring ownership from your name into the name of your trust. Below is a list of common assets that may need to be retitled. Need help? Read the support article:

Bank Accounts

- ☐ Checking*
- ☐ Savings*
- ☐ Certificate of Deposit
- ☐ Safe Deposit Box

Education Savings Accounts

- ☐ 529's*
- ☐ UTMA*
- ☐ UGMA*

Retirement Accounts

- ☐ 401K*
- ☐ IRA*
- ☐ Roth IRA*
- ☐ Annuities*
- ☐ Pensions and Profit Sharing

Business

- ☐ Closely Held Stock
- ☐ General Partnership Interest
- ☐ Patent or Trademark
- ☐ Professional Corporation
- ☐ Limited Liability Company
- ☐ Limited Partnership Interest
- ☐ Royalties
- ☐ Sole Proprietorship

Real Estate

- ☐ Real Property
- ☐ Burial Plot
- ☐ Mineral Rights
- ☐ Timeshare
- ☐ Promissory Note—Secured by a Deed of Trust

Brokerage Accounts

- ☐ Mutual Funds
- ☐ Annuities

Health Savings Accounts

- ☐ HSA
- ☐ FSA

Other

- ☐ Aircraft
- ☐ Government Securities
- ☐ Judgment
- ☐ Life Insurance Policy*
- ☐ Personal Property
- ☐ Promissory Note
- ☐ Safe Deposit Box—Unsecured
- ☐ Automobiles, Boats, Recreational Vehicles

*This asset may not need to be retitled, please seek the advice of your financial advisor

For more information on funding your trust, download the [Specific Asset Funding Guide](#).