McCue Fiduciary Services

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Keep an Up-to-Date Copy of the following all together:

- Most up to date Trust documents
- Driver's License/Photo ID
- Copy of Social Security Card, or list that number
- List of Contacts/Beneficiaries/those to Notify upon death

Legal

- Copy of Trust documents
- Copy of Power of Attorney, if any
- Copy of Power of Healthcare Attorney, if any

Financials Savings & Checking Accounts, Certificates of Deposit (CDs), Safe Deposit Box, Brokerage Accounts, Stocks, Mutual Funds, Business or Partnership Interests, 529 Accounts, Pensions, Club Memberships, Secured Notes, Life Insurance Policies, etc.

- Generate a list of any and all financial institutions which hold or handle your financial assets, and keep this list up to date and with your Trust documents.
- This list must include the associated PINs for any debit cards
- Name the Trust as Beneficiary as appropriate OR
- Create new Accounts in the name of the Trust and transfer all assets therein
- Should you need to or desire to create any new accounts for the future, make them in the name of the Trust
- Smaller checking accounts need not be in the name of the Trust (amounts under $10,000)
- Beneficiaries who are not the Trust
    - IRAs: to avoid the possibility of your primary beneficiary losing the right to "roll over" this benefit to their own IRA, use their name as the primary beneficiary. You should name your Trust's Beneficiaries as contingent beneficiaries of the IRA.
    - Bank Checking/Savings: if you want a specific person to receive the funds from a specific banking account without the account entering the Trust to then be distributed, specifically name that person as the beneficiary of that explicit bank account.
- Consider naming the Trust as contingent beneficiary on Life insurance & Annuity policies.
- Make a note of the safe and secure location of your safe deposit box key

Real Estate

- Change Title to put property into the name of the Trust, and provide copies of Quitclaim Deed & Grant Deed
- If purchasing a new piece of property, put the Trust as owner
- Loan/Lien documents, if any
- If property is already in the name of the Trust, provide Quitclaim Deed & Grant Deed to Trust

- Insurance policy documents
- List of utilities' bills
- Keep all these with your Trust documents

Digital Assets: Files and online accounts which are stored on digital devices, such as cell phones, laptops/desktops, etc.

- Track & write down all online accounts (email address, banking, memberships, etc.) and include their login information of username & passcode
- Keep this list with your Trust documents.

Healthcare:

- Keep a copy of your Durable Power of Attorney Health Care with your Trust documents
- Keep a copy of your Advance Health Care Directive with your Trust documents.
- Set up Pre-Need with a mortuary service you would like, include your desires for burial/cremation, services/ceremonies, etc.

Automobiles

- Have the Title readily available with your Trust documents, ownership remains in your name, no need to move the car(s) into the Trust.