

Step 5 • Funding Instructions

Move your accounts

Your trust only works for things that are in it. This step puts your accounts in it.

Goes into your trust

Bank and investment accounts

- **Your Blueprint lists the accounts** you told us about and what to do with each one. You choose which accounts to move.
- ☐ Go to your bank. Bring your **photo ID** and your **Certification of Trust**. That is the short paper that proves your trust is real. You do not need to bring the whole trust.

Say

“Please change this account into the name of my trust.”

- If they ask for a tax number, give **your own Social Security number**.
- **Your money stays yours.** You use the account the same way as before.

Uses a form

Retirement accounts and life insurance

Stop

Never change an IRA or 401(k) into your trust's name.

These use a beneficiary form. Use our Beneficiary Form Guide.

www.thehivelaw.com/beneficiary-form-guide