

From your drafts to a finished plan

Your Next Steps

You just got your draft documents. This page tells you what to do next, in order. **Do one step at a time.**

1	Read your drafts	Now.
2	Sign your documents	After we email you your final documents.
3	Send us your deed Only if a house or land goes into your trust.	Right after you sign.
4	Call your insurance and your mortgage company	After we email you your filed deed.
5	Move your accounts	After you sign.
6	Put your papers away	After you sign.

☐ Tick it when you finish it. ☐ Only for some people. ● Good to know.

Step 1. Read your drafts

Read your Trust Summary. It is easier to read than the legal documents. Then check 3 things.

- | | | |
|--|---|--|
| ☐ Every name is spelled right. | ☐ Every person has the right job. | ☐ The right people get the right things. |
|--|---|--|

Something wrong?

Reply to our email. Tell us what to change. We fix it and send it back.

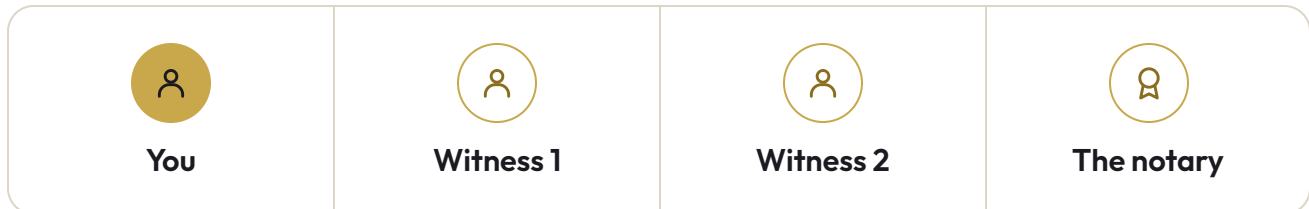
Everything right?

Reply to our email and tell us it all looks good. Then we email you your final documents to sign.

Step 2 · Signing Instructions

Sign your documents

Who must be in the room



Find 1 notary and 2 witnesses. All 3 must be in the room with you while you sign. **The notary cannot be one of your 2 witnesses. You need 3 people.**

Before signing day

Stop Do not sign, initial, or date anything yet.

- ☐ Print **every page** of your final documents.
- ☐ Decide what you will initial. Use the **Power of Attorney guide** and the **Health Care Directive guide**.

Where to find a notary

- Your bank, a UPS Store, or a notary who comes to your home.
- ☐ **Call first.** Some banks will not notarize wills, so ask.

Say

“I have estate planning documents to sign. I am bringing 2 witnesses.”

Who can be a witness

A witness must be an adult, age 18 or older, who **gets nothing from your plan**. The same 2 witnesses can sign everything.

Good picks: ☒ A neighbor ☒ A friend ☒ A coworker

These people cannot be a witness

- ☒ You or your spouse.
- ☒ Anyone named in your documents. That means your trustees, your agents, your executor, and all of their backups.
- ☒ Anyone who gets anything from your trust or your will.
- ☒ The husband or wife of any of those people.
- ☒ The notary.
- ☒ Anyone who gives you medical care, like your doctor or nurse.

In a hospital or care home? Only 1 of your 2 witnesses may work there.

What to bring

- ☐ A **photo ID** for you. A driver's license or passport works.
- ☐ A **blue or black pen**.
- ☐ The **name of the county** you are signing in.
- ☐ All of your documents, **not signed**.
- ☐ **This page**.
- ☐ A **photo ID for each witness**. Each witness also needs to know their **address, phone number, and email**.

I own an LLC or a business. We write the papers that move your part of the LLC into your trust. You sign them with your other documents. Keep the signed papers with your LLC records.

Rules for signing day

- 1 Sign your name **the way it is printed** under the line.
- 2 Sign **only while your witnesses and the notary are watching**.
- 3 Initial **only the lines you chose**. Leave every other initial line empty.
- 4 Leave the line "This document prepared by" **empty**.
- 5 **Do not cross anything out**. Do not write in the margins.

Stop

Made a mistake? Stop. Do not fix it. Reply to our email and we will tell you what to do.

The date of your trust

Your trust has a blank line for its date. **Write the day you sign.** Some other documents ask for "the date of your trust." Write that same date every time.

Write it down

The date of my trust _____

The county I am signing in _____ My notary _____

Witness 1 _____ Witness 2 _____

Married? Each of you has your own will, power of attorney, health care directive, and HIPAA form. Finish one person's, then the other's.

Sign in this order

A pen mark means that person signs. Tick each document when it is done.

Document	 You	 Witness 1	 Witness 2	 The notary
☐ 1 Your Trust You: Sign every line with your name under it. Witnesses: Both sign.				
☐ 2 Certification of Trust The short paper that proves your trust is real. You: Sign and date.				
☐ 3 Your Will You: Sign the will. Then sign the next page, called the Self-Proving Affidavit. Witnesses: Both sign the will and print their names and addresses. Both sign the affidavit.				
☐ 4 Your Deed Only if a house or land goes into your trust. You: Each owner signs. Witnesses: 1 witness signs beside each owner.				
☐ 5 Your Power of Attorney You: Initial the lines you chose. Sign and date. Witnesses: 1 witness signs and prints their name, address, phone, and email.				
☐ 6 Your Health Care Directive You: Initial the lines you chose. Sign and date. Witnesses: Both sign, date, and print their names and addresses. The notary: Nothing. No notary on this one.				
☐ 7 Your HIPAA form You: Sign and date.				

Step 3

Send us your deed

Only if a house or land goes into your trust.

1

Your turn

☐ **Take a photo**

Take a clear photo of **every page of your signed deed** with your phone. A scan works too.

2

Your turn

☐ **Email it to us**

Email it to **melissa.breyer@thehivelaw.com**. Keep the paper deed with your other signed papers.

3

Our turn

We file it

We file your deed with your county. Your home is **not in your trust until it is filed**.

4

Our turn

We send you the filed copy

When the county sends it back, we **email you the filed copy**.

Wait for that email before you do Step 4.

Only read this if it fits you

- ☐ **I own more than one property in Georgia**
 - ☐ Each property has **its own deed**. Sign each one.
 - ☐ Scan each one and put them all in **one email** to us.

Only read these if they fit you

☐ I own a rental property

- ☐ Each rental has **its own deed**. Sign each one and email each one to us.
- ☐ Does the rental have a mortgage? Call that lender **before we file the deed**. Get the answer **in writing**.

Ask

“May I move this property into my living trust?”

- Is the rental going into an LLC and not your trust? **Ask the lender first**, any time before we file the deed.

☐ I own property in another state

- We cannot do a deed in another state. **An attorney in that state** must do it.
- ☐ Call an attorney there. Give them a copy of your Certification of Trust.

Say

“I need a deed that moves my property into my revocable living trust.”

- That property is not in your trust **until that deed is filed**.

Step 4

Call your insurance and your mortgage company

Do this after we email you your filed deed. Make these 3 calls. The words to say are written out for you.

☐ Tick it when you finish it. ☐ Only for some people. ● Good to know.

☐ Call your home insurance agent

Call 1 of 3

Say

“My home is now owned by my living trust. Please add my trust to my policy.”

☐ Ask them to send you the change **in writing**.

☐ Do the same for an **umbrella policy or a flood policy**, if you have one.

I spoke to _____ Date _____

☐ Still have the **title insurance papers** from when you bought your home?
Call that company and ask:

Ask

“Does my policy still cover my home now that it is in my living trust?”

I spoke to _____ Date _____

☐ **Call your mortgage company**

Call 2 of 3

Skip this if your home is paid off.

Say

"I moved my home into my living trust. I still live there. Please note it on my loan."

- Keep making your payments **the same way**.

I spoke to _____ Date _____

☐ **Call your county tax office**

Call 3 of 3

Say

"My home is now in my living trust. What do you need from me to keep my homestead exemption?"

- Some counties ask for a short form.

I spoke to _____ Date _____

Only read this if it fits you

☐ **I own a rental property**

After the deed is filed, call the insurance agent **for that rental**.

Say

"This property is now owned by my living trust. Please add my trust to the policy."

I spoke to _____ Date _____

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

Step 6

Put your papers away

- ☐ Keep your signed papers together **at home, in a fireproof box or safe.**
- ☐ Tell the people in charge of your plan **where the papers are.**
- ☐ **Call your doctor's office.**

Ask

"How do I get you a copy of my Health Care Directive and HIPAA form?"

- ☐ **Give a copy** to the people you named to make health choices.
 - Your trustees get a free call with us, any time, even years from now. It is called the **Orientation Call**. We explain their job.
- ☐ Want certain people to get certain things, like a ring or a watch? Write it on your **Personal Property Memorandum**. Sign and date it any time after you sign your trust. No witness. No notary. Keep it with your trust.

Where I keep my papers

Where _____

Who I told _____

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