



California Living Trust Checklist

Everything to gather before you create your living trust

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Tick each box as you gather the item. Keep this sheet with your papers while you complete your trust questionnaire.

Name: _____ Date started: _____

Part 1: Personal Identification

Your Information (Grantor/Trustor)

☐ **Full Legal Name**

As it appears on your driver's license or passport. Include middle name.

☐ **Date of Birth**

Used to identify you in legal documents.

☐ **Social Security Number**

Required for tax identification. Your trust will use your SSN while you're alive.

☐ **Current Address**

Full street address where you reside.

☐ **Marital Status**

Single, married, domestic partnership, divorced, or widowed.

☐ **Spouse Information (if married)**

Full legal name, date of birth, and SSN of spouse.

Part 2: Real Estate Information

Properties to Transfer into Trust

☐ **Property Addresses**

Full street address of each property you want in the trust.

☐ **Legal Description**

Found on your deed. Example: "Lot 5 of Tract 12345 as per map recorded..."

☐ **Assessor's Parcel Number (APN)**

Found on your property tax bill or county assessor's website.

☐ **Current Title/Ownership**

How is the property currently titled? (Your name only, joint tenancy, etc.)

☐ **Mortgage Information**

Lender name, loan number. Note: Most mortgages allow transfer to trust.

☐ **Estimated Property Value**

Approximate current market value of each property.

Part 3: Financial Accounts

Bank and Investment Accounts

- ☐ **Bank Accounts**
Checking, savings accounts. Bank name, account type, approximate balance.
- ☐ **Brokerage Accounts**
Investment accounts (Schwab, Fidelity, Vanguard, etc.). Account numbers and values.
- ☐ **Certificates of Deposit (CDs)**
Bank name, maturity date, approximate value.
- ☐ **Money Market Accounts**
Institution name, account number, approximate balance.

Note: Retirement Accounts

Do NOT put retirement accounts (401k, IRA, 403b) directly into your living trust. This triggers immediate taxation. Instead, name beneficiaries directly on these accounts. Your trust can be named as beneficiary if you have minor children or special circumstances.

Part 4: Other Assets

Additional Property to Include

- ☐ **Vehicles**
Year, make, model, VIN. Note: California allows vehicles via beneficiary designation.
- ☐ **Business Interests**
LLC memberships, partnerships, S-corp shares, sole proprietorships.
- ☐ **Valuable Personal Property**
Jewelry, art, collectibles, antiques worth over \$5,000.
- ☐ **Intellectual Property**
Patents, copyrights, trademarks, royalty rights.
- ☐ **Life Insurance Policies**
Company, policy number, death benefit. Note: Usually pass via beneficiary designation.

Part 5: Beneficiary Information

Who Will Receive Your Assets

- ☐ **Primary Beneficiaries**
Full legal names, relationships, addresses, dates of birth.
- ☐ **Backup (Contingent) Beneficiaries**
Who receives assets if primary beneficiary predeceases you?
- ☐ **Distribution Percentages**
How should assets be divided? (Equal shares? Specific percentages?)
- ☐ **Specific Bequests**
Any specific items you want to go to specific people?

☐ **Minor Children Provisions**

At what age should minor children receive their inheritance? (18, 21, 25, staged?)

Part 6: Trustee Designations

Who Will Manage Your Trust

☐ **Initial Trustee**

This is you (and your spouse if married). You manage your own trust while alive.

☐ **First Successor Trustee**

Who takes over if you become incapacitated or pass away? Full name, address, phone.

☐ **Second Successor Trustee**

Backup if first successor is unavailable. Full name, address, phone.

☐ **Guardian for Minor Children**

Who should raise your children if something happens to both parents?

Part 7: Healthcare and Financial Powers

Incapacity Planning

☐ **Healthcare Agent**

Who makes medical decisions if you cannot? (Often same as successor trustee)

☐ **Backup Healthcare Agent**

Alternate person to make medical decisions.

☐ **Financial Power of Attorney Agent**

Who handles finances outside the trust if you're incapacitated?

☐ **End-of-Life Wishes**

Your preferences regarding life support, pain management, organ donation.