Entering A Trust

Agent Logs into their account

Go to the **Sales** drop down tab
- Click **Client Sales**
  - Enter all credit card information
    - Purchase

Print out the next screen that pops up
- This is the login/password for Trust
- Click to sign in and change password
  - I use the city they live in

Enter the **Name of Trust**
- Be sure you enter it <u>correctly!</u>
- Single/Double Grantor

YOUR INFORMATION
- Be sure and enter all information as seen on the paper.
  - **Click SAVE & CONTINUE**

TRUST PROVISIONS

The *Trust Name* will already be populated.
Trust Date will be the day YOU enter the Trust information
Everything else is just entered as they have marked on the sheet

Click SAVE & CONTINUE

YOUR CHILDREN

Click *ADD CHILD*

ALL children **MUST** be entered!!!

You can *disinherit* later.

Be sure the first field (Child of) is correct. Many people have children from other marriages. The field must reflect the *biological* parent.

If your child lives in a different country, still enter address!

Click Submit

DISTRIBUTION OPTIONS

Enter information as seen on sheet

Click SAVE & CONTINUE

ROLES

No information is entered here.
Each role is defined here

Trustee, Healthcare Agents, Financial Agent, and Guardian

ADD PEOPLE & ORGS

Click *ADD PERSON* to enter additional Beneficiaries, Trustees, or POA's.

Be sure you enter RELATED TO and RELATIONSHIP correctly.

Click SUBMIT

Click *ADD CO./ORG/GRP* to enter businesses or churches, etc if you want to bequest to them.

Click SUBMIT

BENEFICIARY SELECTION

Click *Add Beneficiary*

In the Beneficiary drop down tab, chose your beneficiary.

Enter % of Trust

If there are NO additional distribution limitations, click this box.

Contingent Beneficiaries

Select One Named Drop down the white box and chose what Contingent is.

(Return to Trust, Per Stirpes, etc)

Click **SAVE & CONTINUE** and keep entering if you have more.

DISINHERIT

Add Disinherited

Chose Individual

Enter Maximum Amount

Click SUBMIT

TRUSTEE SELECTION

Go to each drop down tab, and enter Initial, Primary, and 2nd Alternate. 2nd Alternate is not required. Chose NONE if that is the case.
If married, the Initial Successor will already be populated with Spouse.
Be sure you pay attention to each one individually because some spouses chose different Successors.

Click SAVE & CONTINUE

FINANCIAL AGENT

Go to each drop down tab and chose.
Enter Primary Agent
Enter Alternate Agent
If there is not a 2nd Alternate, click drop down box and chose **NONE**

Click SAVE & CONTINUE

HEALTHCARE AGENT

Enter Primary Agent
Enter Alternate Agent

Click SAVE & CONTINUE

ADVANCED DIRECTIVES

Enter information as client requested

If married, the female will have an extra box to choose.

PREGNANCY EXCEPTION

No matter her age, this must be filled out

Click SAVE & CONTINUE

ORGAN DONATION

Enter all information as client requested

Be sure and enter if they want to limit donations (internal organs, etc)

Be sure each box and extra notes are entered correctly in the fields.

Spouses do have different wishes, so don't assume both will be identical

Click SAVE & CONTINUE

GUARDIAN SELECTION

This section is only for Minor Children or Adult Disabled Children

Enter Primary Guardians

Enter Alternate Guardians

Click SAVE & CONTINUE

SPECIFY BEQUESTS

Click Add Bequest

Enter 'From' and 'Recipient'

Chose Bequest Type

Add description

Jewelry, guns, China, car, etc.

Be very clear all instructions here for distribution order, etc if they want that.

Be sure the From and Recipient if filled out correctly

Click SUBMIT

OTHER OPTIONS

Enter burial instructions, final thoughts, special directives, and feelings from client.

This section has NO FORCE OF LAW

Click SAVE & CONTINUE

QUALITY CONTROL

Call the client at this point and verify everything that you have entered. The agent may have written something incorrectly, or you could have clicked the wrong box.

Verify spelling, birthdates, addresses

Even if you think you know the answer, *still ask*!!!

This is very important because printing the Trust is a lot of paper, and you don't want to reprint it

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Go back and Click REVIEW

This breaks down each section and notifies you if it's complete.

If all is complete,

Click HERE TO CONTINUE

Now, Click on each of the **BLUE** tabs on the right side.

Click ***Generate Document*** for each

Print each section

Put section into the binder with tabs in the correct order

Give Trust back to Agent to be Notarized

Once Trust is Notarized, review the Trust and be sure each section is filled out completely and accurately.

Dated, Initialed, and Signed

Once verified, **Scan** the Trust and **Save** on computer

Go back into each Blue Tab

Click on *Upload Document*

Select Document (choose file)

Select Document Type

Enter Description – name of section

Click Upload File

Do this for each of the 6 Sections

Give the Trust back to the Agent to deliver.
I put 3 copies of the Certificate of Trust and the Deedwerx order form inside front cover of binder

The Trust is now complete!

ESTATE PLAN
DOCUMENTS