

Understanding Your Joint Revocable Living Trust

Your Joint Revocable Living Trust is the document that provides for the disposition of any assets it owns or receives at or pursuant to your deaths to your intended beneficiaries.

Review Your Joint Revocable Living Trust: It is very important to review your Joint Revocable Living Trust to ensure it accurately reflects your wishes before signing the document. If you need to modify the document, simply access the SmartGuide to create a new or modified Joint Revocable Living Trust.

You have prepared both Last Wills and Testaments **AND** a Joint Revocable Living Trust. You **MUST** sign the Joint Revocable Living Trust **before** you sign your Wills.

Making your Joint Revocable Living Trust Official

Necessary parties: Both of you
A notary public

Instructions:

1. Gather the above parties within sight and hearing of one another.
2. If all of the following statements are true, tell the notary that you have read and are familiar with all of the Trust's provisions, that you are over 18 years of age, of sound mind, and under no constraint or undue influence.
3. Fill in the day and month on the first page of the Revocable Living Trust (the date should be the date you are executing your document). Example:

_____, and _____, both of Frisco, Denton County, Texas, as Settlor(s), hereby enter into this **TRUST AGREEMENT** with _____ and _____ Co-Trustees (collectively referred to herein as "Trustee"), on this the  day of , 2025.

4. Sign the Joint Revocable Living Trust where indicated, and have the notary read and complete the notary block, sign and seal.
5. **Funding of the Trust:** If you want to use the Trust to allow certain assets to avoid being subject to the probate process, then you will want to transfer such assets to the Trust during your lifetime. See the document titled, "Instructions For Funding Your Revocable Living Trust" for more information.
6. Once your Trust has been executed, scan and upload the document to your vault.

NOTE: A Certificate of Trust is provided for your Joint Revocable Living Trust. The Certificate provides evidence of the existence of the Trust and its funding. Banks or other financial institutions may require a copy of it for opening or transferring accounts. County Clerks may require it upon transfer of real property to the Trust. You may wish to



sign the Certificate of Trust immediately after you sign and initially fund your Joint Revocable Living Trust, but keep in mind that you generally will have to sign a new Certificate of Trust whenever real property is transferred to or from your Joint Revocable Living Trust.