

# CARTHEW LAW FIRM, PC

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## **ASSET INSTRUCTIONS**

### **Ownership Must be Transferred**

Bank accounts (Checking/Saving/Money Market) and CD's – Transfer ownership to the Trust

Real Estate Deeds – Transfer ownership to the Trust

Stocks, Shares, Bonds, Mutual Funds, Partnership Interest and Unit Certificates – Transfer ownership to the Trust

Vehicles, Boats, RV's worth over \$100k per vehicle – Transfer ownership to the Trust

### **Beneficiaries**

Life Insurance – Does not need to be changed but beneficiary may be an individual or the Trust

401k/Annuities/IRA's/KEOGHS/Retirement Plans – First beneficiary must be an individual and the Trust may be listed as a secondary beneficiary

Transfer on Death Account – Trust may be listed as a beneficiary