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Living Trust Setup Checklist

Action Checklist — ClearLegalTips.com (2026)

Create and — crucially — fund your trust.

Create

Chose an online service or attorney

Named trustee, successor, and beneficiaries

Set distribution terms

Sign

Signed the trust before a notary

Created a pour-over will

Fund (most-missed step)

Re-titled real estate into the trust

Moved accounts into the trust

Updated beneficiary designations

Told your successor trustee where documents are

Notes

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vary by state and change over time. Consult a licensed attorney for advice specific to your situation.