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Free Legal Resource · 2026

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Revocable Living Trust Checklist

Action Checklist — ClearLegalTips.com (2026)

Creating the trust is step one — funding it is what makes it work.

Set Up

Named the grantor, trustee, and successor trustee

Listed beneficiaries and their shares

Chose distribution terms

Fund the Trust

Re-titled real estate into the trust

Moved bank/investment accounts into the trust

Updated beneficiary designations

Execute

Signed the trust before a notary

Created a pour-over will

Stored documents and told your successor trustee

Notes

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