

Living Trust Amendment Checklist

Action Checklist — ClearLegalTips.com (2026)

Update a revocable trust the right way.

Step 1 — Confirm

- ☐ Trust is REVOCABLE (irrevocable = see an attorney)
- ☐ You are competent and have authority to amend

Step 2 — Draft Precisely

- ☐ Referenced the exact article/section + new language
- ☐ Included the "all other terms remain" clause
- ☐ Did NOT mark up the original trust

Step 3 — Sign

- ☐ Signed with the SAME formality as the original (notary/witnesses)

Step 4 — Sync the Plan

- ☐ Stored the amendment WITH the original trust
- ☐ Told your successor trustee where to find both
- ☐ Checked will, POAs, and beneficiary designations still match

INSTRUCTIONS FOR USE

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