



EstateVault



Your Trust, step by step.

How a Revocable Living Trust comes together at EstateVault,
from your first question to a fully funded Trust.

MICHIGAN EDITION

Start reading ›

Six steps to a Trust that works.

ONLINE · ONE SITTING

1

Take the quiz

Free. See which package fits.

Page 3 ›

2

Answer your questions

About 15 minutes.

Page 3 ›

3

Check out

\$600. Attorney review optional.

Page 4 ›

4

Receive your documents

By email, saved to your account.

Page 5 ›

ON PAPER · AFTER DELIVERY

5

Sign

Ink, witnesses, and a notary where required.

Page 6 ›

6

Fund your Trust

Move your assets into the Trust's name.

Page 7 ›

- **PLAIN ENGLISH**

Funding: moving your assets into the Trust's name.

1

STEP 1 OF 6

Take the free quiz.

 Free Online

A few questions. **Based on your answers**, the quiz shows which package fits.

2

STEP 2 OF 6

Answer your questions.

 About 15 min Online

Your family and any young children

Your successor trustee

Who receives your property

The age young beneficiaries inherit



You confirm EstateVault prepares documents from your answers and does not give legal advice.

BEFORE YOU BUY

Some situations need a lawyer, not a form. If your answers show one, like providing for a dependent with special needs, we stop and refer you to a licensed Michigan attorney.

• PLAIN ENGLISH

Successor trustee: the person you choose to manage the Trust when you can't.

Beneficiary: a person who receives property from your Trust.

Check out.

 \$600 Online

Trust Package

One fixed price. No hourly bills.

\$600

Attorney review

Optional. A licensed Michigan attorney.

+\$300

- ✓ **Checkout only.** Attorney review can't be added after your documents arrive.
- ✓ **Reviewed first.** If you choose it, your documents are released once the review is complete.

• PLAIN ENGLISH

Attorney review: a licensed Michigan attorney reads your documents before you receive them.

Receive your documents.

 **By email**

 **Saved to your account**

A **secure sign-in link** arrives by email. No password to create.
Download your documents any time.

YOUR TRUST PACKAGE



Revocable Living Trust

The core document. Holds your property.



Certification of Trust

Proves your Trust exists, privately.



Assignment of Personal Property

Moves your belongings into the Trust.



Pour-Over Will

Catches anything left outside the Trust.



Trust Funding Instructions

Your guide to funding, asset by asset.



Durable Power of Attorney

Covers your finances if you can't.



Advance Healthcare Directive

Covers medical decisions if you can't.



Signing instructions

Included with every document.

Sign your documents.

 On paper

 Signed in ink

- 1 **Print** each document.
- 2 **Read** its signing instructions.
- 3 **Sign in ink** in front of the witnesses it calls for.
- 4 **Add a notary** where the instructions require one.
- 5 **Store the originals** safely, and tell your successor trustee where.

WHY IT MATTERS

Until your documents are signed correctly, they don't take effect.

• PLAIN ENGLISH

Witness: an adult who watches you sign and signs to confirm it.

Notary: an official who confirms your identity when you sign.

Successor trustee: the person you choose to manage the Trust when you can't.

Fund your Trust.

 On paper

 Varies by asset

Signing builds the box. Funding fills it. A Trust only controls what's inside it.



SIGNED ONLY

Assets stay in your name.

They may go through probate.



SIGNED + FUNDED

Assets are in the Trust's name.

They pass without probate.



Funding means retitling your assets into the Trust's name.



Your guide: Trust Funding Instructions walk you through each asset.



The safety net: your Pour-Over Will catches anything left out. Those assets may still go through probate first.

PLAIN ENGLISH

Probate: the court process that settles a person's affairs after they pass.

Pour-Over Will: a Will that moves anything left outside your Trust into it.

How funding typically works.



Your home

New deed, recorded with your county Register of Deeds.



Bank accounts

Retitled by your bank, using the Certification of Trust.



Investment accounts

Retitled by your brokerage, using the Certification of Trust.



Retirement accounts

Usually stay in your name. The beneficiary designation decides who receives them.



Life insurance

Stays with the policy. The beneficiary designation decides who receives it.



Vehicles

Retitled through the Michigan Secretary of State.



Personal belongings

Already covered by your Assignment of Personal Property.



Everything else

Covered in your Trust Funding Instructions.

• PLAIN ENGLISH

Deed: the document that shows who owns real estate.

Retitle: change the owner's name on an account to the Trust.

Beneficiary designation: a form with your account provider naming who receives it.

Is your Trust fully funded?

SIGN

- ☐ All documents signed, witnessed, and notarized as required

RETITLE

- ☐ Home: new deed recorded
- ☐ Bank accounts
- ☐ Investment accounts
- ☐ Vehicles, if applicable

REVIEW

- ☐ Retirement account beneficiaries
- ☐ Life insurance beneficiaries

STORE

- ☐ Originals kept safe, location shared with your successor trustee

KEEP IT FUNDED

Property you buy later, like a new home or account, can be titled in the Trust's name from the start.



EstateVault

Six steps. One protected family.

Take the free quiz and see which package fits your answers.

Take the free quiz ›

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