



LEGACY WEALTH ACADEMY

THE FAMILY WEALTH BLUEPRINT COLLECTION

PROTECT THE TRUST ACTIVATION PLAY

A practical guide to organize your wishes, activate your trust, and help your family know what comes next.

YOUR OUTCOME

Leave your family clear instructions and a usable plan.

WORKSHEETS | CHECKLISTS | NEXT STEPS

Educational guide. Not individualized legal, tax, investment, or insurance advice.



HOW TO USE THIS PLAYBOOK

TURN A SIGNED DOCUMENT INTO A WORKING PLAN.

Move through one page at a time. Write what you know. Mark what needs professional review. You do not need every answer before you begin.

STEP 1

Choose one next move

Circle the one action that would create the most clarity in the next 30 days.

STEP 2

Name who can help

List the professional or family member who needs to be part of the conversation.

STEP 3

Set a date

Put a date beside the next action so the guide becomes a plan, not another saved file.



PROTECT - ACCESS - REPOSITION

YOUR TRUST IS THE CONTROL LAYER.

A trust can organize who manages property and how it moves. It works best when ownership, beneficiaries, documents, and family instructions point in the same direction.

Control

Who can manage trust property if you cannot?

Transfer

Who receives what, when, and under which rules?

Coordination

Do titles and beneficiary forms match the plan?



TRUST CLARITY

WHAT A REVOCABLE TRUST CAN - AND CANNOT - DO.

Clear expectations make a stronger plan.

MYTH

Myth

Putting everything in a revocable trust automatically protects it from your creditors.

REALITY

Reality

A revocable trust can help manage and distribute properly held assets, but it does not create a universal tax or creditor shield.

MYTH

Myth

Signing the trust finishes the job.

REALITY

Reality

Funding, titles, beneficiaries, and family instructions are the activation work.



[SAVE THIS PAGE](#)

YOUR TRUST ACTIVATION CHECKLIST.

Check completed items. Mark the rest for your attorney, tax professional, or advisor.

- ☐ Trust signed and current
- ☐ Successor trustee selected
- ☐ Home and deeds reviewed
- ☐ Bank and brokerage accounts reviewed
- ☐ Retirement and insurance beneficiaries reviewed
- ☐ Business ownership reviewed
- ☐ Powers of attorney completed
- ☐ Medical directives completed
- ☐ Digital assets documented
- ☐ Trust funding instructions received
- ☐ Family knows where documents are stored



WORKSHEET

WHAT DO YOU OWN - AND HOW DOES IT PASS?

List categories only. Do not write account numbers in this workbook.

Real estate

Home, rental property, land. Who owns it today?

Financial accounts

Bank, brokerage, retirement, annuity. Title or beneficiary?

Protection

Life insurance and other beneficiary-based assets.

Personal and business

Business interests, vehicles, valuables, digital property.

YOUR NOTES



TAX ID

DOES YOUR TRUST NEED AN EIN?

Many grantor-owned revocable trusts can use the grantor's tax ID while the grantor is alive. A separate EIN is often needed when a revocable trust becomes irrevocable, including after death. Confirm the right timing with a tax professional.

Why it helps

When required, the EIN identifies the trust for tax filings and financial accounts.

How to get it

Apply free through [IRS.gov](https://www.irs.gov). Save the confirmation letter with the trust records.

What it does not do

An EIN does not create or fund a trust, or create tax savings by itself.



MAKE IT USABLE

THREE TOOLS FAMILIES ARE GLAD TO HAVE.

Small organizational steps can save your family hours of searching later.

Trust bank account

Ask the bank and your advisors what documentation and tax ID are required.

Home title review

Have an attorney review the deed, mortgage, homestead rules, and intended ownership.

Family document vault

Store current copies and instructions in a secure place your decision-makers can find.



WORKSHEET

WHO STEPS IN WHEN LIFE CHANGES?

Write the names and roles your family should know. Confirm each person is willing and understands the responsibility.

- ☐ Successor trustee
- ☐ Financial power of attorney
- ☐ Medical decision-maker
- ☐ Estate planning attorney
- ☐ Tax professional
- ☐ Financial or insurance professional
- ☐ Primary family contact

YOUR NOTES



MEETING PREP

BRING BETTER QUESTIONS.

Use these prompts to make professional meetings more productive.

- ☐ Which assets should be reviewed for trust ownership?
- ☐ Which assets should stay outside the trust?
- ☐ Do beneficiary forms match the plan?
- ☐ What work remains after signing?
- ☐ When would the trust need its own EIN?
- ☐ Who will keep titles and records current?
- ☐ How often should the plan be reviewed?



ACTION PAGE

MAKE THE NEXT 30 DAYS COUNT.

Choose three realistic actions. Give each one an owner and a date.

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YOUR NOTES



BUYER IMPLEMENTATION PATH

IDENTIFY THE NEED. THEN GET HELP.

Complete this workbook and the estate analysis first. Mark and his team can then help you complete a revocable living trust and estate plan through appropriately authorized professionals serving clients in all 50 states.

1. Run the analysis

Visit myestate.legacywealthco.com and organize the gaps you want to solve.

2. Name the need

Choose what you need help setting up, reviewing, or coordinating.

3. Request a buyer review

Visit legacywealthco.com/schedule-review after the worksheet is complete.