**Step by step instructions- How to fill out Revocable Trust and Certification of Trust**

**Grantor Revocable Trust**

Go to the title

**Ok Let's start**. Put your trust name in the blank space at the top, and then a comma. Make sure the next 3 words are "a Revocable Trust".

Done with the title

Ok. Next: You are the grantor and then your city and state. Done

Trust name is next with a comma and "a Revocable Trust" after the name. Done

In Part III check the first box. Done

Part VI check first box and then put your name.

Next line whomever you want to be successor.

Done

Part D 2nd box,

part F 1st box Done

Part XI 1st box Done

(Parts XII and Part XIII can be done at a convenient time, IF needed.)

Go to part XIV and put in the name of the State where you live. Done with that

**(I am Pennsylvania, is there anything special with my state I would need?)**

**(?When we get to the Certificate of Trust.)**

You can fill out schedule A when you want

**Do I need to fill out all of the Schedules? Schedule A is for the currencies.** Correct.

DO NOT SIGN ANYWHERE YET.

The Schedule A fill out at home. It is for your Trust private papers only, like the Minutes.

The other schedules, B through D, if necessary, after your appointment.

**File : Certification of Trust (individual trustee) edited.docx**

This is next. 👆

Thank you very much! Again, Schedule A is to include Zim and currencies and nothing else.

Next Doc.

TITLE is **CERTIFICATION OF TRUST**

Delete the other state statute listed and copy the correct State one to replace it from the Table in the List of Statutes Doc. In the Docs and Files Room. Directly under the heading. Done

(Do I put this also on my trust? No, only on the Certificate of Trust.)

Then Fill in Trust Name, then Your Name, the Trust name, and then the date of the Trust.

Done

Then your address, then Trust name, then your name. Done

In part 4 your name the Trust name and your address again. Done

In part 5 put in your State.

The rest is for the notary, along with the Trust pages that need to be notarized.

The notary does his thing when you sign in front of him in all the places that need signing in the 2 documents.

It is done.