



Deed Processing Checklist

If there is/ are properties, we need:

1. Copy of the grant deed (If client does not have it, it can be pulled up for a fee of \$20)
(Please provide in email)
2. Driver's License (If not submitted already)
(Please provide in email)
3. Email
4. Telephone #
5. Mailing Address
6. Address of the property to be transferred to the trust
7. Date of occupancy
8. The name of the trust