

JOHNSON, GASINK & BAXTER, LLP

# TWO THINGS CERTAIN®

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January 2014

Happy New Year! This month's newsletter begins with a brief reminder about the open enrollment for our TrustGuard Program and follows with a list of things you should tell your successor Trustee.

## **TRUSTGUARD Enrollment Open for 2014**

All existing JGB Living Trust clients are invited to enroll in our TRUSTGUARD™ annual review and update program through the months of January and February. For more information, call our office (757.220.9800) or see our [website](#).

## **Five Things You Should Tell Your Successor Trustees**

You have named family, friends, or a trusted advisor to take care of your affairs upon your incapacity or passing. This Successor Trustee (or Personal Representative, in the case of a Will) will take responsibility for all of your assets and follow the legal instructions you left behind in your will or Trust. Our documents cover your legal affairs comprehensively but they do not dwell on the personal details that may help your successor manage your affairs as you would like. Here is a checklist of consideration you may want to discuss with your Trustee:

### **1) Where You Keep Your Plan**

JGB recommends you keep your original binder in a safe place in your home. Make sure your Trustees know where your binder is and what it looks like. Your plan will not work if your loved ones don't know where to find it.

### **2) Where To Find Your Assets**

Providing your Trustee with a list of account numbers, insurance information, and financial institution contact information can save a lot of time and trouble after your death. If you have a home safe or safe-deposit box, let your successor know where it is and be sure to make arrangements now so that they may gain access later.

### **3) Names and Addresses of Your Advisors**

Your accountant, financial advisor, insurance agent, and other trusted advisors stand ready to assist your successors. Your home insurance agent needs to be contacted quickly to make sure the home remains insured after your passing. Life insurance agents provide death benefits very quickly after your passing. During the administration of your Trust/estate, your accountant and financial advisor will provide continuity and advice to help settle your affairs.

### **4) Any Special Instructions**

You may have special instructions for the care of children, pets, valuables, or your home. Be sure to leave any letters of instructions to your Trustee in your binder under the 'Personal Information' tab.

### **5) That JGB Stands Ready To Help**

When a client passes, we like to meet with the successor in the first two weeks to review the plan and provide a roadmap for the trust or estate's administration. We appreciate the trust you have placed in us and look forward to providing your successors the same caring service as when we designed and created your plan for you.

Place all instructions you leave for your successor in the 'Personal Information' section of your binder. We'll keep copies of all instructions you provide us in your file. Trustguard™ members can also store messages and information for their successors in their LegalVault™.



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About the Author:

Dan Gasink is an experienced problem solver who helps individuals and businesses achieve and protect their goals of prosperity, stability and growth through appropriate planning. Dan takes great pride in making sure that his work for clients is always reliable, correct, and on time.

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