

CLIENT INSTRUCTIONS FOR PURCHASING REAL ESTATE

Your trust has its own “legal” name that will appear on the titles to property contained in it. The legal name of your trust must state the names of your trustees, who created the trust, and the date the trust was signed.

Look at your Affidavit of Trust, or Article One of your trust and you will find the exact name of your trust. Give this name to the title company. You may also need to provide them with the specific language in your trust stating you can own real estate inside the trust. Look at the Article for My Trustees Powers (Article 12 if you are single, Article 14 if you are married.)

Often a title company may request a copy of your trust. Instead provide them with the Affidavit of Trust, along with copies of the specific articles listed on the Affidavit of Trust. This gives them the information they do need, while keeping the rest of your trust private.

**Please note, if the property you are purchasing is your homestead, please contact our firm prior to purchasing. Your deed needs to contain specific language to allow you to continue to receive your Homestead Exemption.*

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