



Looking Ahead:

- **Thursday, February 27th @ 9:00am:** “What Happens to Your Estate When You Die?”
The Grand, Lifelong Learning: 19781 N. Remington Dr. Surprise, 85374 (Part 1 of 2)
Attorneys Dave Eastman & Darren Richardson
- **Tuesday, March 4th @ 10:00am:** “8 Most Costly Mistakes in Estate Planning”
Sun City Festival Sage Center - Willow Room : 26501 W. Desert Vista Blvd. Buckeye, 85396
Attorneys Dave Eastman & Darren Richardson
- **Thursday, March 6th @ 9:00am:** “What Happens to Your Estate When You Die?”
The Grand, Lifelong Learning: 19781 N. Remington Dr. Surprise, 85374 (Part 2 of 2)
Attorneys Dave Eastman & Darren Richardson
- **Tuesday, March 11th @ 2:00pm:** “6 Myths of Estate Planning”
Freedom Plaza - 13373 N. Plaza Del Rio Blvd, Peoria, 85381
Attorney Darren Richardson
- **Tuesday, March 25th @ 10:00am:** “What Happens to Your Estate When You Die?”
RISE Learning: Rio Salado College - 12535 W. Smokey Dr. Surprise, 85378
Attorneys Dave Eastman & Darren Richardson

February

Funding Your Trust

Why It Matters & How to Stay on Top of It



A trust is an essential estate planning tool, but it is only effective if it is properly funded. Many people assume that once a trust is created, their assets are automatically protected, but that is not the case. Funding a trust means transferring ownership of your assets into the name of the trust. This step is crucial in ensuring that your estate plan works as intended, avoiding probate and maintaining control over your wealth.

Funding a trust involves re-titling assets such as bank accounts, real estate, and investment accounts so that the trust is the legal owner. It is also important to update beneficiary designations on certain accounts, such as life insurance policies and retirement funds, to align with your estate plan.

It is essential to obtain confirmation that assets have been properly transferred into the trust. This means ensuring that you receive statements and documents that reflect the trust's name as the legal owner. Without this step, your assets may still be subject to probate, which defeats one of the main purposes of having a trust in the first place.

The Role of a Pour-Over Will

A pour-over will serves as a safety net for any assets that were not transferred into the trust during your lifetime. Upon your passing, these assets will be “poured over” into the trust. However, the major downside is that any assets passing through a pour-over will **must go through probate** before being placed into the trust. This process can be time-consuming and costly, making it all the more important to keep your trust properly funded.

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Trust Maintenance: Think of It Like a Car. Just like a car requires regular maintenance to stay in good condition, your trust needs periodic check-ups to ensure it is still aligned with your life circumstances and goals. Eastman Estate Planning recommends reviewing your trust at least every three years to ensure no major changes have occurred that could impact your estate plan.

Key Questions to Consider During Your Review:

- Have there been any major changes in your assets?
- Are there any assets that may not be in your trust?
- Have there been personal changes involving those named in your estate plan (e.g., divorce, disability, passing, or changes in relationships)?
- Have you experienced any physical or cognitive changes?
- If your healthcare power of attorney was created before 2022, an update may be needed.

At Eastman Estate Planning, all trust reviews are free for our clients. We want to ensure your estate plan is always up to date and functioning as intended. We can schedule a quick phone call to check in, or we can arrange a Zoom meeting if that is more convenient for you.

If you have any concerns about the status of your trust or want to schedule your complimentary review, reach out to our office today at (602)610-1034. Keeping your trust properly funded is one of the most important things you can do to secure your legacy and protect your loved ones.



Paralegal Tip - Donna Schubert

Watering Hanging Plants

Now that the weather is getting nice and we are placing beautiful hanging flowering plants around the outside of our patios, sometimes it becomes a hassle and a very messy chore to water the pots without the water overflowing and the dirt from the pot getting all over your furniture, patio, and/or outdoor rug(s).

My solution: ICE CUBES – I just drop three to four ice cubes in each pot depending upon the size when they need watering. The ice melts slowly, so I no longer worry about spilling or getting pot drippings all over.



Red Velvet Brownies:

- 1 cup white sugar
- ½ cup unsalted butter, melted
- ¼ cup unsweetened cocoa powder
- 1 ounce red food coloring
- 1 teaspoon vanilla extract
- 1 teaspoon distilled white vinegar
- ¼ teaspoon salt
- 2 large eggs, slightly beaten
- ¾ cup all-purpose flour

Cheesecake Filling:

- 1 (8 oz) package cream cheese (room temp)
- ¼ cup white sugar
- 1 large egg
- ¼ teaspoon vanilla extract

Brownie



Recipe- Allrecipes

Preheat the oven to 350 degrees F (175 degrees C). Grease an 8x8-inch baking pan.

For the red velvet brownies: Whisk 1 cup sugar and melted butter in a large mixing bowl; stir in cocoa, red food coloring, 1 teaspoon vanilla extract, vinegar, and salt, one at a time, mixing well after each addition to avoid lumps. Mix in 2 eggs until thoroughly combined.

Stir flour into cocoa mixture just until combined; set aside ¼ cup batter. Pour remaining batter into the prepared baking dish.

For the cheesecake filling: Beat cream cheese in a bowl using an electric mixer on medium speed until light and fluffy. Add ¼ cup sugar, 1 egg, and ¼ teaspoon vanilla extract; continue to beat until well blended and only small lumps remain, 3 to 4 minutes.

Spoon cream cheese mixture in dollops over the batter in pan; gently smooth tops of dollops even with batter using a knife or offset spatula. Do not overmix. Drizzle reserved ¼ cup of batter over the dollops of cream cheese mixture. Drag a knife or skewer through the batter and cream cheese mixture to create swirls.

Bake in the preheated oven until top is dry and edges have started to pull away from the sides of the pan, about 30 to 35 minutes. Cool completely before cutting into bars.