ATTACHMENT — SCHEDULE A: TRUST PROPERTY (FUNDING SCHEDULE)

DRAFT for attorney-council review — not client-facing. Customer completes at funding; engine validates non-empty at assembly.

Schedule A — Property Conveyed to the Trust. Itemize each asset transferred using the table below. Assembly rule: every funded asset must have a completed row (all columns) before the package is considered funded; a non-empty section alone is not sufficient.

#	Asset Description	Asset Type	Title as of Transfer Date	New Trust Title (per Schedule B)	Transfer Date	Transfer Document	Document Executed?	Notarized?
1	Example: 123 Main St, Denver CO (real property)	Real property	John Q. Settlor	"John Q. Settlor and Jane Q. Settlor, Trustees of the [Trust Name], dated [Date], and any amendments thereto, [Trustee Name], Trustee"	2026-09-01	Warranty Deed, recorded Denver County	Y	Y

POD/TOD Status line (per financial account): `[ ] None [ ] Existing — see note on row`

Schedule B — Titling Instructions. All Trust Property shall be titled: "[Trust Name], dated [Date], and any amendments thereto, [Trustee Name], Trustee" — the titling standard of Section 14-H.2, with the then-serving trustee(s) named as trustee(s) and not individually.

Schedule B sub-rules:

1. Business interests (LLC/partnership). Title as: "[Trust Name], dated [Date], as [member/partner] of [Entity Name]". Consult the entity's operating agreement or partnership agreement for transfer restrictions before retitling. [FILL IN per entity; attorney to customize.]
2. S-corporation shares. Title as: "[Trust Name], dated [Date], Trustee, as shareholder of [Entity Name]". [ATTORNEY-CONFIRM: S-corporation stock held by a trust risks involuntary S-election termination under IRC §§1042/1361 — verify trust qualification as a permitted shareholder (QSST/ESBT) before any S-corp share is transferred.]
3. Financial accounts with existing POD/TOD designations. The Trustee shall (a) contact the financial institution to re-register the account in the trust's name, or (b) if re-registration is not permitted, document the POD/TOD designation on Schedule A with a note that the asset passes outside the trust and is not subject to the trust's terms.

4. Real property — deed type and recording. Real property shall be transferred by a deed acceptable to the title company or lender, typically a Special Warranty Deed or Trustee's Deed. Do not convey real property by Quitclaim Deed unless directed by the Settlor in a written amendment. After execution, record the deed in the county recorder's office where the property is located within 30 days. Obtain an owner's title insurance policy in the trust's name if required by the lender or recommended by the title company.

Pour-over language. Any assets of the Settlor not previously transferred to this Trust shall be deemed pour-over assets and shall be distributed to the Trustee upon the Settlor's death or upon written direction by the Settlor. The Trustee shall hold such pour-over assets and distribute them in accordance with the terms of the Trust Instrument.

Assembly rule: §14-H.1 requires every funded asset to appear on Schedule A with titling consistent with Schedule B before the package is considered funded.