

Top 10 Uses For Revocable Trust Accounts

Discover how Quorum's Revocable Trust Account provides flexibility, privacy, and peace of mind while ensuring your assets are distributed according to your wishes.



Avoiding Probate

Enables assets to pass outside probate, reducing delays, expenses, and administrative burden for heirs.



Enhanced Privacy

Protects confidentiality by keeping financial and family matters out of the public record.



Streamlined Asset Transfer

Facilitates direct distribution of assets to beneficiaries, expediting settlement and minimizing probate delays.



Avoiding Ancillary Probate

Prevents multiple probate proceedings when real estate is owned in more than one state.



Maintaining Control and Flexibility

Preserves full control during your lifetime, with the ability to amend, add, or revoke provisions as circumstances change.



Reducing Family Conflict

Minimizes disputes among heirs by establishing clear and legally binding instructions.



Planning for Minors or Special Needs Beneficiaries

Provides secure management of assets for children or dependents with special needs.



Potential Tax Planning

Can be structured to maximize exemptions and reduce the overall tax burden on heirs.



Business Succession Planning

Supports an orderly transfer of ownership and management for business interests.



Planning For Incapacity

Authorizes a trustee to manage assets in the event of illness or incapacity, avoiding costly court proceedings.

Make estate planning easier—for you. To get started, click below or visit info.quorumfcu.org/trustapplication.

Open a Revocable Trust Account—100% Online



Quorum