

# 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](https://info.quorumfcu.org/trustapplication).**

**Apply for a Revocable Trust Account—100% Online**

**Quorum**