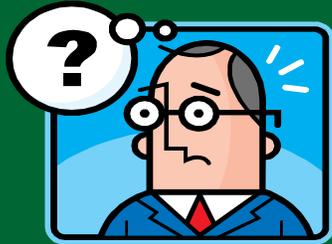


## Still Have Questions?

*At Hallman & Associates, we are always here to help. If you have a question or are unclear on something, just ask us! We truly value your business and strive to provide our clients with customer service that exceeds their expectations.*



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## **Don't Forget About Our Annual Trust Maintenance Program!**

**Call Courtney  
With Questions  
Regarding This  
Program.**



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**Hallman & Associates, P.C.**

*Leaders in Estate and  
Business Planning*

**You Signed  
Your Trust;**

***Now What?***



## Where to Keep Your Trust

“Where should I keep it?” is one of the most common questions we get once our clients have signed their Trust. Often, clients feel they should store their notebook in a safety deposit box, and the logic behind this notion is sound. We recommend, however, that you keep your Trust notebook somewhere much more accessible. The reason for this is simple—when you need your documents, the bank may be closed.

You should not need your notebook on a daily, weekly, or even monthly occasion. When the time comes that you do need it, it may be an emergency situation. If there is a medical emergency, you need your Power of Attorney for someone to make an immediate decision. **We highly recommend you keep your Trust notebook in an easily accessible location.**



As a new feature, we now offer online access to your documents for just \$49 a year. To receive your secure link for 24/7 access, please contact our office.

## Who Should Have a Copy?

There is a reason we do not file trusts at the courthouse; it simply is nobody else’s business what you have. When you sign your Trust documents, you keep the original set and we will store an executed copy electronically. The reason we keep an executed copy is to give you that ‘peace of mind’ in knowing that should something ever happen to your original (fire, flood, burglary, tornado, etc.), we still have a perfectly acceptable copy of your trust documents stored safely in our office and with offsite backup.

As with almost everything, there are pros and cons with making and handing out multiple copies of these private documents. The positive aspect of having so many duplicates is everyone has their own copy. However, the negatives really outweigh the positives in regards to having multiple copies. Should you ever need to make an amendment to your Trust, you must then provide each person in possession of a copy of the trust with a copy of the amendment. The more copies made, the less control you have over who sees them, and the harder it is to maintain identical sets between persons who possess them.

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The exception to this rule is: we recommend providing copies of the healthcare specific documents to your physician, hospital, or those named in the document. You should give a copy of the following executed documents to the doctor and/or hospital for them to keep in your file:

- ◆ Healthcare Power Of Attorney
- ◆ Living Will/Advanced Directive

## When to Notify Our Office:

- Death of Spouse
- Significant Change in Your Situation
- Death of Trustee or Beneficiary
- Value of Your Estate Changes Significantly
- Sell/Purchase Property (Only if you have questions)
- Open/Close Account (Only if you have questions)



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For More Information

Visit Our Website:

[www.hallmanlawoffice.com](http://www.hallmanlawoffice.com)