

Entering a Trust into the USDeeds Order Form:

The process is the same whether entering as a Grantor or Grantee. For the purposes of these instructions, I have entered a trust as a Grantee.

1. Select "+Add New Grantee"

Enter Grantee Information

1 Order Info ✓ 2 Property Info ✓ 3 Grantor/Grantee ✓ 4 Additional Info ✓

Property Address: FL

+ Add New Grantee ← Select

Type	Name
------	------

Grantee Address ⓘ

You can use...

FL

Enter New

*Unfinished orders will appear in Order History and may be completed at a later time.

2. In the drop down menu titled "Type" - Select "Trust"

Enter Grantee

1 Order Info ✓

Property Address: FL

+ Add New Grantee

Type

Grantee Address

You can use...

FL

Enter New

Type

- Individual
- Individual
- Corporation
- Limited Liability Company
- Trust ← Select
- Limited Partnership
- General Partnership
- Estate

Last Name

Gender

Male

Female

Marital Status

married

unmarried

widow(er)

Spouse First Name

Spouse Middle Name

- Enter the Name of the Trust, the Trust Date, and the Trustees. Add a check mark next to the name of each of the Trustees of the Trust. For example, if the name of the property is titled as John Doe and Jane Doe, Trustees of the Doe Re Mi Family Trust dated January 1, 2025, then you would enter it as:

The screenshot shows a modal window titled "Enter New" with the following fields and annotations:

- Type:** A dropdown menu set to "Trust".
- Name of Trust:** A text input field containing "Doe Re Mi Family Trust", with a red arrow pointing to it labeled "Trust Name".
- Trust Date:** A date picker field showing "01/01/2025", with a red arrow pointing to it labeled "Trust Date".
- Trustees:** A list of trustee entries. The first two entries, "John" and "Jane", have their checkboxes selected. Each entry has input fields for "First Name", "Middle Name", and "Last Name". A red arrow points to the checkboxes labeled "Checkbox". Another red arrow points to the name fields labeled "Trustee Names".
- Buttons:** At the bottom right, there is a blue "Add Grantee" button with a red arrow pointing to it labeled "Select". At the bottom right of the modal, there is a "Save and Return" button. At the bottom left, there is a "Close" button.

- Select "Add Grantee"
- Select the Address associated with the Grantee and Select "Save and Return".

Enter Grantee Information

The screenshot shows the "Enter Grantee Information" page with the following elements:

- Progress Bar:** Shows four steps: 1 Order Info, 2 Property Info, 3 Grantor/Grantee (active), and 4 Additional Info.
- Property Address:** FL
- Grantee Table:**

Type	Name	
Trust	Doe Re Mi Family Trust	Edit X Delete
- Grantee Address:** A section with a dropdown menu and an information icon.
- You can use...:** Radio buttons for "FL" (selected) and "Enter New".
- Buttons:** "Previous" button on the left, and "Save and Return" button on the right. A red arrow points to the "Save and Return" button labeled "Select".
- Footnote:** *Unfinished orders will appear in Order History and may be completed at a later time.

When you return to the Order Summary Screen, the information entered should appear like this.

Country: United States

Grantee Information

Grantee 1 Type: Trust
Trust Name: Doe Re MI Family Trust
Trustee(s): John Doe
Jane Doe
Trust Date: 01/01/2025
Vesting:
Grantee Address: FL
City, State Zip: FL
Country: United States

Additional Information

NOTE: The Additional Information section must be reviewed and completed prior to creation of documents. Please click "Edit" to review.

Relationships:
Order Notes:
Continuous marriage affidavit: No

HOMESTEAD PROPERTY: a transfer of homestead property that severs ownership from tenancy by entireties or joint tenancy with right of survivorship into ownership as tenants in common MAY cause a change in the applicable Save Our Homes cap (limitation on increases in assessed value of property). Please do not submit your order if this is a concern. We will assume that any submitted order is an authorization for us to proceed.

HOMESTEAD PROPERTY: a transfer of homestead property to a revocable trust may cause the county property appraiser to request trust

- If there are additional details for the Trust, you may enter additional information in the Additional Information Section under "Order Notes."

Enter Additional Information

1 Order Info ✓ 2 Property Info ✓ 3 Grantor/Grantee ✓ 4 Additional Info ✓

Property Address: FL

Relationships:

Order Notes:
 ← Enter Additional Order Notes Here

Upload Supporting Documents:
Prior deed and tax bill requested ⓘ

Continuous marriage affidavit ⓘ
 Yes No

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HOMESTEAD PROPERTY: a transfer of homestead property to a revocable trust may cause the county property appraiser to request trust

- In order to ensure that the property is titled correctly, when the Trust is a Grantee, we recommend uploading a Certificate of Trust as a supporting document. If the Trust has not been executed yet, a draft copy is sufficient. This also provides us with a second point of reference to confirm your documents are drafted correctly.