FINANCIAL STRATEGIES, INC.

"Legacy" Living Trust Portfolio

Checklist

answering

"What Do I Need" - To Do A "Legacy" Trust Portfolio?

Please bring or have these items available for your first meeting with your Certified Document Preparer:

(Check When Done) (Note: Usually, all items will be returned to you after the trust portfolio is completed.)

[ ] Correct "spellings" of your portfolio back-up appointees, heirs and your advisors. (Note: Middle initials are normally used instead of full middle names)

[ ] "Originals" of any current estate planning documents you already have. (Wills, Trusts, Living Wills, Power of Attorney for Health or Money care, etc.)

[ ] Your Original Real Estate Deeds. (Or legible copies with full legal descriptions) **Note:** We can get them off the internet if you can't find them.

[ ] Name and account numbers of all your bank accounts and investment accounts that are not IRA or other pension funds. (Values are optional)

[ ] Name and account/policy numbers of all IRA (including any inherited IRA's) or other pension funds and life insurance and annuity plans. (Values are optional)

[ ] Safe Deposit Box #'s and a simple list of contents. (If applicable)

[ ] Auto/Camper/Mobile Home/Motor Home/Golf Cart/Boat, Airplane, etc. "Year" and "VIN" number. (Vehicle Identification Number)

[ ] Business information showing creation or ownership documentation, deeds, leases, etc. (If applicable)

[ ] Information on any loans you have made to others. (If applicable) Or loan you owe to others.

[ ] Copies of any other legal documents that still apply to you or your situation. Examples are: Social security legal disability statement, divorce decree, prior wills and trust terms, divorce degrees, lawsuits active or pending, etc. (If applicable)

[ ] We work by "word of mouth" and have done so since 1991 providing our trust portfolio services. Feel free to refer any friend, associate, neighbor, etc. who you think may have interest in our estate planning services.

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