



FSI Client Information and Disclosure

Please Read Each Item.

The Living "Legacy" Living Trust Portfolio

I understand...

1. The consultant representing Financial Strategies, Inc. is not an attorney and FSI is not a law firm. Under Arizona statutes, I further understand that my information given is private, but not "privileged" as it would be with a law firm.
2. No legal counsel or legal advice has been offered by the consultant. My consultant and his firm have informed me that they are certified in document preparation for the state of Arizona. (Financial Strategies under Certification # 80738 and Michael D. Anderson under Certification #80737)
3. Financial Strategies, Inc. (FSI) will prepare my "Legacy" trust portfolio based solely upon the representations I have made during the initial "DISCOVERY" information session. I declare that the information given is true, correct and complete.
4. That FSI reserves the right to review my information with an attorney, prior to preparing my documents. (At no additional cost, unless I am notified otherwise)
5. FSI shall correct any inaccuracies (cosmetic, mis-types, etc.) in its documents at no cost to me for a period of 90 days from the "delivery" date. (Date My Living Legacy Trust Portfolio is delivered)
6. That I have the right to take my completed documents to an attorney of my choice for a review. Should said attorney make suggestions of a "legal" nature of any portfolio document wording (more than a cosmetic change), FSI agrees to make those changes at no additional charge for a period of 90 days from the delivery date. (The attorney fees would be my own expense)
7. I realize that the trust to be created will be under my complete control and that I can change it or revoke it at any time, prior to disability or death.
8. That the trust to be created will not have any affect on my personal income taxes.
9. It is my responsibility to have the trust portfolio documents notarized and to transfer whatever assets I choose into the trust to "fund" it and that until the trust is funded, it will not provide any of the benefits.
10. That the FSI trust portfolio is a "package" plan. I acknowledge that the literature given me describes fully what is included in the package. Any service provided to me that is not listed in the sales literature "package" will be billed at the regular company billing rate.
11. The consultant may agree to provide "funding" assistance to me at no additional charge, or in return for providing referrals, however I acknowledge that this is not part of the package plan.
12. Whether assisted by an FSI consultant or not, I acknowledge that FSI can not control any mistakes or misconceptions made by representatives of my investment/bank accounts regarding changing title to the name of my trust. I hold FSI harmless for such written or verbal requests for transferring title to the name of my trust that I may make to said investment/bank account representatives; and their resulting actions that may be deemed "mistakes".
13. Any real estate deed preparation and recording is provided as a complimentary service of FSI.
14. That I am hiring FSI as my document preparer only. I have provided all necessary information for FSI to begin to prepare my documents immediately. I understand that FSI will complete my documents within 14 working days, or I will be eligible for an additional 10% discount.
15. I have been advised by my FSI consultant about Medicaid planning law changes August 10, 1993, including the possibility that transferring assets to a living trust after October 1, 1993 may increase my waiting period for eligibility. (Deemed to be reversible by later removal of assets from a trust in order to qualify again)

Signed this _____ day of _____, 20____.

Client Signature

Client Signature (Spouse, If married)

RECEIPT

Received of _____, \$ _____ on this date for the establishment of an FSI Living "Legacy" Trust Portfolio. The balance due, if any, shall be payable upon delivery.

FSI Consultant Name (Print)

Signature

Package Cost