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 <u>current</u> estate planning documents you already have. (Wills, Trusts, Living Wills, Power of Attorney, etc.)

[ ] Your Original Real Estate Deeds. (Or legible copies with full legal descriptions)

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

[ ] Name and account/policy numbers of all IRA 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, etc. "Year" and "VIN" number. (Vehicle Identification Number)

[ ] Business information such as inventory, accounts receivable, legal agreements, deeds, leases, etc. (If applicable)

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

[ ] 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, lawsuits pending, etc. (If applicable)

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