FUNDING

In order for us to assist you in "funding" your Trust(s), we need you to provide us with the following information and documentation:

_______ A copy of a Deed for each parcel of real estate which you own.

_______ If you have an outstanding mortgage on any of the parcels of real estate, the name and phone number of the Lender, as well as the Loan Number.

_______ Change of beneficiary forms for any insurance policies, on your life, as well as the policy numbers (*please DO NOT fill out these forms, send them blank*).

_______ Change of beneficiary forms for each Individual Retirement Account which you have, or copies of recent statements (*please DO NOT fill out these forms, send them blank*)

_______ Change of beneficiary forms for insurance and retirement plans offered through your employers (*please DO NOT fill out these forms, send them blank*).

_______ Copies of account statements for your money market accounts, brokerage accounts, and mutual funds.

_______ For any stocks you own which are not held in a brokerage account, copies of your account statements, and if you hold the stock in certificate form, a copy of the certificate(s) .

_______ If you own a business, copies of the existing stock certificates as well as a few *original blank* stock certificates.

_______ If you own a business with a partner, a copy of any Buy-Sell Agreement or Stock Purchase Agreement.

_______ Other ____

____

____

____

____