



DOCUMENTS NEEDED FOR FUNDING OF TRUST

The funding of the trust is imperative to your estate plan. Please provide my office with the items listed below. Feel free to email, fax or mail the documents needed. These items can be prepared and executed along with the Trust and accompanying documents at the time of signing (or at a later date if necessary). Copies of anything will suffice, unless providing original stock certificates. As for anything that requires changes be made online, we will provide you with this language after documents are completed. If you have any questions, feel free to contact my office by phone 847-583-2244 or email my assistant Alyssia @ alyssia@d-a-law.com

- A copy of a Deed for each parcel of real estate which you own (*this should be in your possession, even if you hold a mortgage on said property*).
- 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 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 Corporation, copies of the existing stock certificates as well as a few *original blank* stock certificates.
- If you have an LLC, a copy of the Operating Agreement and/or 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.

DENKEWALTER & ANGELO

1835 ROHLWING ROAD, SUITE D
ROLLING MEADOWS, IL 60008
TEL: 847.583.2244