TRUST FUNDING CHECKLIST

Bank and Credit Union Accounts
Current statement for all accounts

Life Insurance
Statements showing insurance company agent and address, owner and policy number

Retirement Funds
Statement showing custodian of account, address, account number, and owner

Investments
Copy of statement showing company, address, account number and owner
Original company stock certificated

Insurance Company and Agent for Homeowners, Liability and Automobile
Statement showing Insurance company name and agent, address, and policy number

Real Estate
Most recent tax bill
Deed

Financial Advisor
Name, address and phone number

Bonds
Original bonds

Business Interests
Partnership agreement
Corporate Book

Recent Income Tax Return

Family Photos
Attorney Ross would appreciate it if you could bring in a few photos of the family and loved ones for whom you wish to plan, as it makes the people important to you come more alive to him as you discuss you're planning options for each person.

If you have any questions, please call Gary Chamberlain at (920) 743-9117 or Fax: (920) 743-9180 or email gary@rossestateplanning.com