Funding Kit List

Below is a list of Assets that can be funded to your trust. Before your meeting you should gather the identifying information for your below assets:

1. **Personal Real Estate**
2. **Secured Realty Note Interests**
3. **Promissory Note Interests**(Non-Realty)
4. **Entity Business Interests** — Closely Held
5. **Cash Accounts**— Bank & Money Market Accounts, Cds (Etc.)
6. **Registered Securities**— Mutual Funds / Managed Accounts
7. **Stocks & Bonds**— Listed On A Public Exchange
8. **Annuity Contracts**
9. **Life Insurance Contracts**
10. **Individual Retirement Accounts —** Traditional & Roth
11. **Retirement Plans —** 401(K), 403(B), Deferred Comp. (Etc.)
12. **Motor Vehicles —** Vintage Cars, Rvs, Mobile Homes (Etc.)

The eStatePlan™ Funding Kit is an electronic Asset Inventory Ledger. These ledgers, or schedules, are created by entries in the Asset Entry Pages. After your asset information has been entered, you will ESIGN them which implements the quick-funding method for your trust. These asset schedules help to clearly establish the transfer intent of all assets listed at the time of death.