

# Funding Kit

## My LifeCard Plan® / eStatePlan™

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Below are a Table of Contents of the Assets that are currently listed and have input boxes on the Funding Kit:

1. PERSONAL REAL ESTATE — Real Property Personally Owned
2. SECURED REALTY NOTE INTERESTS — Personally Owned
3. PROMISSORY NOTE INTERESTS (Non-Realty) — Secured / Unsecured
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 — With Death Benefits
9. LIFE INSURANCE CONTRACTS — Personally Owned
10. INDIVIDUAL RETIREMENT ACCOUNTS — Traditional & Roth IRAs
11. RETIREMENT PLANS — 401(K), 403(B), Deferred Comp. (etc.)
12. MOTOR VEHICLES — Vintage Cars, RVs, Mobile Homes (etc.)