





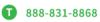






Thank you for your interest in our estate planning service using advanced planning software. To ensure compatibility of our service to your specific circumstances, please answer the following questions to the best of your knowledge.

Is your net worth over \$10,000,000 if single or \$20,000	0,000 if married?
The amounts in this question are approaching the feder	ral estate tax exemption amount.
C Yes No	
And seem distributions are notional born on locality adopt	- J - L:1,1, 9
Are you disinheriting any natural born or legally adopted children?	
O YesO No	
Do you feel you have the mental capacity to go through	n the process of an estate plan?
C Yes C No	
Do you confirm that you are acting by your own free w	vill to go through the process of an estate plan?
O Yes O No	
168 100	
Is there a history of family litigation in the trusts and es	states arena with you or your family?
C Yes C No	
163 110	
Will you be gifting any money to a non-family member	r who also provides care for the you?
C Yes C No	•
700 m 2 10	
Do you reside in North Carolina?	
This service is currently unavailable in North Carolina	
C Yes C No	
Are you a U.S. Citizen?	
Client #1  Yes  No	
Client #2 O Yes No	
Citent #2 Tes No	
I certify that I have answered the above questions truth	fully and to the hest of my knowledge
Client #1	Client #2
Printed Name:	Printed Name:
Signature:	Signature:
Phone No.:	Phone No.:
Email:	Email:
Address:	
Referred by:	





















The following supplemental services may be available to you for your convenience:
Trust Services Fee: \$1,450
Notarization: \$20 (Only available in select TransGlobal offices, please inquire) Our service can coordinate the notarization of your prepared estate planning documents.
Property Deed Filing:
State(s): Number of Properties:
Our service can coordinate the preparation of a deed to transfer your home into the trust. Pricing includes all County Recorder fees and costs for ENCORE to pull the last recorded deed, prepare the deed, and prepare all state and county specific documents.  *This service is not available in Louisiana, Massachusetts, Hawaii, North Carolina, and District of Columbia. In Virginia, you will need to provide a copy of your last recorded deed.
<ul> <li>\$500: New York</li> <li>\$450: Washington</li> <li>\$400: Nevada and New Jersey</li> <li>\$350: Illinois, Maryland, and Wisconsin</li> <li>\$300: All other states</li> </ul>
Existing Estate Plan Review & Summary: \$125
Our service can prepare of a summary of an existing trust.
Assignment of Business Interest into Trust: \$100
Our service can prepare a business assignment that transfers your business interest into your trust. The benefit of this is making it clear that you want the entity to be owned by your trust.



888-831-8868



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