



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 \$20,000,000 if married?

*The amounts in this question are approaching the federal estate tax exemption amount.*

☐ Yes ☐ No

Are you disinheriting any natural born or legally adopted children?

☐ Yes ☐ No

Do you feel you have the mental capacity to go through the process of an estate plan?

☐ Yes ☐ No

Do you confirm that you are acting by your own free will to go through the process of an estate plan?

☐ Yes ☐ No

Is there a history of family litigation in the trusts and estates arena with you or your family?

☐ Yes ☐ No

Will you be gifting any money to a non-family member who also provides care for the you?

☐ Yes ☐ No

Do you reside in North Carolina?

*This service is currently unavailable in North Carolina.*

☐ Yes ☐ No

Are you a U.S. Citizen?

Client #1 ☐ Yes ☐ No

Client #2 ☐ Yes ☐ No

I certify that I have answered the above questions truthfully and to the best of my knowledge.

**Client #1**

Printed Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Phone No.: \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

Referred by: \_\_\_\_\_

**Client #2**

Printed Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Phone No.: \_\_\_\_\_

Email: \_\_\_\_\_

**T** 888-831-8868

**W** [www.transglobalus.com](http://www.transglobalus.com)

**A** 185 W Chestnut Ave, Monrovia, CA 91016



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.*

- \$500: New York
- \$450: Washington
- \$400: Nevada and New Jersey
- \$350: Illinois, Maryland, and Wisconsin
- \$300: All other states

\_\_\_ 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.*