

Review of Legal Matters

Name : _____

Phone Number: _____

Date	Item	Provider	Phone Number	Action Item	Date	Follow Up	Done (X)
	Will						
	Trust						
	Social Security						
	Change Bank Account						
	Credit Unions						
	IRA's						
	Medical Plan						
	Insurance Policies						

“Get Ready, Get Set...Cuz”
Beatrice Toney Bailey

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“Get Ready, Get Set...Cuz”
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