



Susan Sullivan

• Attorney at Law •

Dear Client:

You advised me that you wish to create a Living Revocable Trust as part of your estate plan. A trust offers benefits such as:

1. Avoiding probate for all assets properly transferred to the Trust;
2. Creating a flexible and efficient method to transfer your Estate after death;
3. Protecting against Guardianship proceedings if you should become legally incompetent;
4. Reducing the risk of a Will contest and the expense of Court challenges to your Estate Plan;
5. Reducing or saving death taxes, depending upon the size of your Estate at your death;
6. Protecting the privacy of your Estate Plan from public scrutiny.

In order for your Trust to provide these benefits, it must be funded, which means that it must own your assets. I will gladly assist you in funding your Trust by reviewing your assets and advising you how to go about transferring those assets to your Trust. In order to accomplish this, I ask that you bring in the following:

1. Deeds
2. Life Insurance policies
3. Annuity statements
4. Bank, Savings and Loan and Credit Union Account statements
5. Investment account statements
6. Savings Bonds
7. Stock Certificates
8. Any other information showing assets you own

Sincerely,

Susan Sullivan