

Estate Planning Tabs (17)	Irrevocable Trust Tabs (11)	Corporate Documents □ Tabs (12)	Organization Tabs (15)	Will Tabs (8)	Retirement Trust Tabs (7)	Trust Administration Tabs (24)	Custom Settlement Counsel Trustee Tabs (9)	Gun Trust Tabs (10)
<ul style="list-style-type: none"> • Introduction • Overview • Living Trust Agreement • Will • Nominations • Personal Information • Funding Instructions • Power of Attorney • Certificate of Trust • Trustee Affidavit • Privacy Affidavit • Trust Assets • Health Care • Memorial Instructions • Property Agreements • Personal Effects • Other Documents 	<ul style="list-style-type: none"> • Introduction • Trust Agreement • Overview • Trust Assets • Tax Filings • Correspondence • Instructions To Trustee • Certification of Trust • Demand Right Notifications • Charitable Deduction Calculation • Investment Reports and Agreements 	<ul style="list-style-type: none"> • Organizational Resolutions • Bylaws • Stock Certificates • Register of Shareholders, Officers & Directors • Financial Statements • Tax Information & Tax Returns • Shareholder Agreements • Compensation Plans & Compensation Resolutions • Fringe Benefit Plans • Third Party Agreements & Contracts • Minutes & Written Consent Actions • Other 	<ul style="list-style-type: none"> • Table of Contents • General Information • Certificate/Articles • Organization Agreement • Management Tools/Agreements • Tax Filings • Asset List/Valuation Reports • Funding Documents • Transfers of Interest • Ownership Certificates • Plans and Minutes • Correspondence • Miscellaneous • Operations Manual 	<ul style="list-style-type: none"> • Overview • Will • Personal Information • Power of Attorney • Health Care Documents • Memorial Instructions • Personal Effects • Other Documents 	<ul style="list-style-type: none"> • Overview • Trust Agreement • Certificate of Trust • Assets & Beneficiary Designations • Tax Filings • Financial Statements • Correspondence 	<p>Estate Documents:</p> <ul style="list-style-type: none"> • Estate Planning Documents • Funeral/Memorial Instructions • Death Certificates/Marriage Licenses • Administrative Trust & Assets • Subtrusts & Assets • Distributions & Claims • Other <p>Asset Details:</p> <ul style="list-style-type: none"> • Real Estate • Stocks & Bonds • LLCs, Partnerships, Closely-Held Corps. • Receivables & Cash • Life Insurance • Jointly Owned Property • Personal Property • Powers of Appointment • Annuities, IRAs, other Retirement Accounts • Account Rollovers/Beneficiary Designation details • Funeral & Administration Expenses • Debts, Liens, & other Payables • Losses & other Expenses • Tax Returns • Probate Documents 	<ul style="list-style-type: none"> • Gathering • Evaluation • Initial Visit • Creating Trustee Authority • Analyze & Test • Presenting the Preliminary Plan • Building the Plan • Implementation • Confirmation 	<ul style="list-style-type: none"> • Table of Contents • Introduction • Overview • Firearms Trust Agreement • Instructions to Trustee • Trust Assets • Funding Documents • Tax Filing • Transfers of Interests • Other Documents