



# Signature Documents

Specializing in Wills & Trusts

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## IMPORTANT PLEASE READ IN FULL

The purpose of our meeting is to get your assets into your Trust. To do this we must send a letter and a Certificate of Trust to the companies where you have your assets.

I legally must have proof that these are your assets; a recent statement will usually suffice. A statement will have the company name, address, telephone number, and your account number. It will also have whose name or names the account is in, which is very important for funding the trust properly. **Last month's statement is usually best.**

**You must have this information with you at your appointment.**

**Bring in statements on any of the following that you might have:**

Checking Accounts  
CD's  
Stock Accounts  
Investment Accounts  
Mutual Funds  
Pension Funds  
Life Insurance Policy  
Fixed Annuity Policy

Saving Accounts  
Credit Union Accounts  
Actual Stock Certificates  
Bonds  
IRA's  
401K's  
Out of State Deeds  
Variable Annuity Policy