

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 SettlementCounsel Trustee Tabs (9)
<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 • Contributions • 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