

# For Clients of our Maintenance Programs

*Estate Protection Review & Refinement™, PlanCheck™ & ILITServe™*

## Let's get your info up to date

(As always, your personal data is preserved for internal use only)

### **CONTACT INFORMATION:**

Full Name as you use it for legal purpose (most people use only a middle initial):

**Client 1:** \_\_\_\_\_ Nickname: \_\_\_\_\_  
*First Middle Last*

1. Birth Date \_\_\_/\_\_\_/\_\_\_ Email: \_\_\_\_\_

2. Home Telephone: \_\_\_\_\_ Cell: \_\_\_\_\_ Office: \_\_\_\_\_

3. Address: \_\_\_\_\_  
*Street City State Zip*

4. Status in case we may not have it (and you want to tell us):

- Single    Engaged    Married    Divorced    Separated    Re-married    Widowed

**Client 2:** \_\_\_\_\_ Nickname: \_\_\_\_\_  
*First Middle Last*

5. Birth Date \_\_\_/\_\_\_/\_\_\_ Cell: \_\_\_\_\_ Office: \_\_\_\_\_ Email: \_\_\_\_\_

6. Are you a Review & Refinement Client?   Yes   No   Not Sure

7. Are you an Insurance Trust Maintenance Client?   Yes   No   Not Sure

### **I/we want information on:**

- Updating** my estate plan in some respect
- Do I need my life **insurance trust**?
- Reducing **income taxes**
- Special Needs** planning
- Do I need my **current life insurance**?
- Inheritance Trusts** to protect my children or grandchildren
- Reverse** Mortgage
- Starting a **Business** or acting as a **consultant**
- Financial** or **insurance advisors**
- Review and Refinement Program**

- Reviewing** my estate plan
- Can I **amend** my **irrevocable** trust
- Gifting**
- Long Term Care** Insurance
- I need help with **income tax preparation**
- College** Planning
- Purchasing or Selling **Real Estate**
- When is my **next review**?
- Other:**

# What Interests You??

Please indicate any seminar or workshop topics that interest you for future Dinners or Briefings  
- Please Check off – or if you want to – number in order of preference – topics that interest you.

## Planning:

- How To Talk To Loved Ones (who don't want to talk to you, but should) About Their Estate Plan
- Settling The Estate (“Listen Buddy, we can do this the easy way or the hard way. Which one do you want?”)
- Jewelry Or Other Hard To Value Assets Appraisals
- Disposing Of A Lifetime Of “Treasures.” Ever cleaned out a house lived-in for 40 or 50 years?
- Vacation Home And Heirloom Property Planning. How to keep it in the family with harmony.

## Saving Taxes / Philanthropy:

- How To Give Money To Charity Instead Of The Government In Estate Taxes
- Accomplishing Modest Philanthropy – Make a Little Mark on Society and a Big Mark on your Family
- Accomplishing Major Philanthropy – Make A Big Mark. Period.

## Financial:

- How and When To Choose A Financial Advisor and The Role Of The Family Financial Assistant
- Retirement Plan Trusts
- How Best To Make Gifts and Loans To Family
- Business Succession Planning
- Professional Practice Succession Planning

## Protection:

- Personal Document And Data Storage
- Asset Protection Basics
- Asset Protection For Doctors And Other Professionals
- Special Needs Trusts for Loved Ones with Unique Needs
- How To Have The Advantage Of Inheriting In A Trust When Your Parents Didn't Leave You One

## Essentials:

- Living With Your Inheritance Trust
- Living With Your Irrevocable Trust
- Living with Your Revocable Trust
- We All Say It's Ok To “Pull The Plug,” but What Do We Really Mean, and When Is It Time?
- What Does It Mean To Be A Trustee and When Is A Professional Trustee A Good Idea?