In this section of the binder, please provide the information or the location of these Documents:

Living Trust:

WILL:

Business Succession Plan:

Real Estate Deals:

Contracts with Individuals:

Other Important Documents:

Financial Plan:

Names of associates who can sign Business and Corporate Checks:

Bank:       Account #:

Name of Assoc.:       Phone #:

Address:       City:       State:    Zip:

Bank:       Account #:

Name of Assoc.:       Phone #:

Address:       City:       State:    Zip:

Bank:      Account #:

Name of Assoc.:       Phone #:

Address:       City:       State:    Zip:

Bank:       Account #:

Name of Assoc.:       Phone #:

Address:       City:       State:    Zip:

Bank:       Account #:

Name of Assoc.:       Phone#:

Address:       City:       State:    Zip:

Bank:       Account #:

Name of Assoc.:       Phone #:

Address:       City:       State:    Zip:

Bank:       Account #:

Name of Assoc.:       Phone #:

Address:       City:       State:    Zip:

Bank:       Account #:

Name of Assoc.:       Phone #:

Address:       City:       State:    Zip: