PLANNING FOR *TODAY AND TOMORROW* IN 4 SIMPLE STEPS

1 GATHER IMPORTANT INFORMATION AND COMPLETE INTERVIEW

Pre-Appointment

- ☐ **Complete Family Data Form, Asset & Liability Form & Sign Interview Certification Form (sent via email or mail with instructions).**
- ☐ **Send forms back to LegacyLock 48 hrs prior to 1st appointment.**

1st Appointment

- ☐ **Meet with LegacyLock to complete interview:** Select your beneficiaries, trustees, & make other decisions necessary to create your estate plan documents.

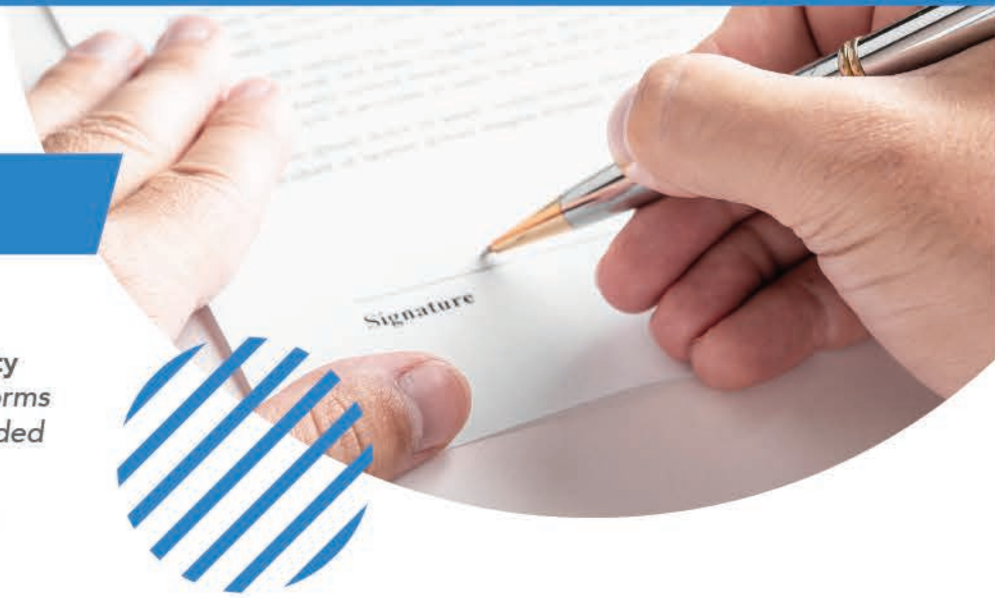
Post-Appointment

- ☐ **Collect statements/policies for:**
  - *Auto/Home insurance/Umbrella-Declaration Pages*
  - *Life Insurance Policies*
  - *Long-term care Insurance Policies*
  - *Retirement accounts (most recent statements)*
  - *Savings (most recent statements)*
  - *Annuities (most recent statements)*
- ☐ **Send copies of statements/policies to LegacyLock 48hrs before 2nd Appointment.**

2 SIGN AND NOTARIZE YOUR ESTATE PLAN DOCUMENTS

2nd Appointment

- ☐ **LegacyLock will provide a binder with all your printed documents ready to be signed and notarized. You will need a notary and two witnesses to complete this step.** *(Please note that once you execute your Trust, any changes to your Trust after you have signed should be made as an amendment or restatement).*



3 FUNDING TRUST AND ASSET OPTIMIZATION DISCOVERY

2nd Appointment

☐ **Review all assets listed on Asset & Liability form** *(review titled property, beneficiary forms & tangible property, make updates as needed for funding).*

- *Auto & Home Insurance-Umbrella Policy*
- *Life Insurance*
- *Long-term Care Insurance*
- *Retirement accounts*
- *Savings*
- *Real Estate Deeds*
- *Make recommendations for adjustments if needed via licensed professionals.*

For additional guidance on funding: Please refer to "Funding Kit" in your LegacyLock software.

4 IMPLEMENT ASSET PROTECTION AND OPTIMIZATION

3rd Appointment

☐ **Implement any changes to your assets for better protection and future performance based on your needs and desires. We work with independent advisors and/or licensed insurance agents to optimize your current and future needs.**

☐ **Upload your documents:** We recommend you upload any physically signed or notarized documents to your E-Vault in the software for easy access in an emergency.

Final Step:
We are here to help you moving forward.

☐ **Review your plan annually with your team!**

☐ **Make changes to your plan as needed.** We recommend you reach out to our team to make changes and we will walk you through how to do it correctly.

TO LEARN MORE, VISIT WWW.MYLEGACYLOCK.COM