

***Your Planning Documents*****Client Name:** SMITH, JOHN & JANE**File No. 2001.000****Date of Signing:** June 1, 2022

<b>Health Care Proxies</b>	1 Original in yellow backer for your file.	2 attorney certified copies in blue backers –give to your agents and/or physician.
<b>Disposition of Remains Appointments</b>	1 Original in yellow backer for your file.	2 attorney certified copies in blue backers –give to your agents.
<b>Powers of Attorney</b>	1 Original in yellow backer for your file.	2 attorney certified copies in blue backers –give to your agents.
<b>If not signed by agent: ➤ Mail to agent?</b>	Yes <input type="checkbox"/> No <input type="checkbox"/>	You took to have executed _____

<b>Irrevocable Trust</b>	2 attorney certified copies in blue backer	Pierro, Connor & Strauss, LLC will keep the original trust until funding is complete, then return the original to the Trustee.
➤ <b>EIN/SS-4</b>	1 copy for your file.	1 copy to your Trustee to keep.
➤ <b>Certification of Trust</b>	____ attorney certified copy(ies) to use to fund your trust.	1 to Trustee to keep or use to fund trust.
➤ <b>Funding Memorandum</b>	Original for your file.	1 copy should be given to your Trustee to keep.

<b>Assignment of Assets</b>	1 copy for your file.
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<b>Wills</b>	1 copy for your file.	Pierro, Connor & Strauss, LLC will keep original in Will safe unless otherwise directed by you.
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<b>Deed &amp; related transfer tax forms</b>	1 copy for your file.	Pierro, Connor & Strauss, LLC will send original documents to be recorded. Once recorded, PCS will send original deed to you and update Schedule “A” of trust, if applicable.
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