

Form 4

Trust Funding Worksheet

Assets to be transferred to your Revocable Living Trust(s)

Financial Accounts:

Bank / Branch	Acct # (last 4 digits):	Type of Acct.	Value	Current name/owner	Complete (x) (sent proof to PCS)

Securities:

Company/Insurer	Type (common/pref)	Change Beneficiary Form	Complete (x) Sent proof to PCS

Real Estate:

Description/Location	Title Held	Value	Complete (x)

Life Insurance:

Description Company/Contract Type	Policy No. (last four digits)	Current Owner	Change of Beneficiary	Value

** If you would like to grant us permission to speak with your Financial Advisor, please indicate your Financial Advisor's contact information below (also please inform your Financial Advisor of this permission) and initial in the box below:

Name: _____

Company: _____

Phone: _____

E-mail: _____

I grant **Pierro, Connor & Strauss, LLC** permission to acquire information and speak with _____, my Financial Advisor, in regards to the funding of my Revocable Living Trust(s).