Estate Planning Tabs (18)	Irrevocable Trust Tabs (13)	Corporate Documents Tabs (12)	LLC Tabs (13)	Will Tabs (8)	Retirement Trust Tabs (7)	Trust Administration Tabs (24)	Custom SettlementCounsel Trustee Tabs (9)	Gun Trust Tabs (9)	Veterans Benefits Tabs (6)
• Introduction • Overview • Living Trust Agreement • Pour-Over Will • Will • Nominations • Personal Information • Funding Instructions • Power of Attorney • Certificate of Trust • Trustee Affidavit • Privacy Affidavit • Trust Assets • Health Care • Memorial Instructions • Property Agreements • Personal Effects • Other Documents	• Introduction • Trust Agreement • Overview • Instructions to Trustee • Certification of Trust • Demand Right Notifications • Trust Assets • Life Insurance Policies • Tax Filings • Financial Reports • Correspondence • Charitable Deduction Calculation • Investment Reports and Agreements	• Organizational Resolutions • Bylaws • Stock Certificates • Register of Shareholders, Officers & Directors • Financial Statements • Tax Information & Tax Returns • Shareholder Agreements • Compensation Plans & Compensation Resolutions • Fringe Benefit Plans • Third Party Agreements & Contracts • Minutes & Written	• General Information • Certificate of Organization • Operating Agreement • Related Agreements • Meeting Minutes & Resolutions • Tax Filings & Records • Appraisals & Valuation Reports • Funding Documents • Transfers of Interest • Interest Certificates • LLC Strategy Documents • Correspondence • Miscellaneous	• Overview • Will • Personal Information • Power of Attorney • Health Care Documents • Memorial Instructions • Personal Effects • Other Documents	• Overview • Trust Agreement • Certificate of Trust • Assets & Beneficiary Designations • Tax Filings • Financial Statements • Correspondence	Estate Documents: • Estate Planning Documents • Funeral/Memorial Instructions • Death Certificates/ Marriage Licenses • Administrative Trust & Assets • Subtrusts & Assets • Distributions & Claims • Other Asset Details: • Real Estate • Stocks & Bonds • LLCs, Partnerships, Closely-Held Corps. • Receivables & Cash • Life Insurance • Jointly Owned Property • Personal Property • Powers of Appointment • Annuities, IRAs, other Retirement Accounts • Account Rollovers/Beneficiary Designation details • Funeral & Administration Expenses • Debts, Liens, & other Payables • Losses & other Expenses • Tax Returns • Probate Documents	• Gathering • Evaluation • Initial Visit • Creating Trustee Authority • Analyze & Test • Presenting the Preliminary Plan • Building the Plan • Implementation • Confirmation	• Introduction • Trust Guide • Trust Agreement • Appointments • Inventory • Transfers • Tax Filings • Forms • Reference	• Veterans Asset Protection Trust • Veterans Asset Protection Letter • Trust Summary and Funding Letter • VA Benefits Application • VA Correspondence • Correspondence