2020 Beneficiary Maintenance Program
Annual Client Meeting
Client Response Form - **CONFIDENTIAL**

Name:_____
(Please Print)

1. Your Inherited Trust provides for Trust Protections over the assets titled in your Inherited Trust. Please check any of the following that pertain to your current situation so that we can review with you further and ensure the Trust Protections remain in effect:

- ❑ I have a creditor problem (such as a lawsuit) or there is a possibility I may have a creditor problem
- ❑ A family member has a creditor problem (such as a lawsuit) or there is a possibility a family member may have a creditor problem
- ❑ I have recently been divorced, legally separated, or in the process of going through a divorce
- ❑ A beneficiary of my Inherited Trust has recently been divorced or legally separated
- ❑ I have a special health concern that may require long term care
- ❑ A family member has a special health concern that may require long term care
- ❑ I have a special financial concern

2. I need enrolled in DCS (secure portal) ☐ Yes ☐ No

3. Limited Power to Vest for Tax Year 2021? ☐ Yes ☐ No

4. ☐ I withdrew money from my Inherited Trust – please contact me.

5. ☐ I would like Peter (Client Care Coordinator) to contact me

6. If applicable, please provide any updated information requested below:

- ❑ A beneficiary of my Inherited Trust has recently been married
- ❑ A beneficiary of my Inherited Trust has legally changed their name, both the new and the prior name of the beneficiary are noted below
- ❑ I have a new son/daughter/grandson/granddaughter (their name is noted below)
- ❑ I have recently moved and my new address is noted below.
- ❑ My home phone number is now : (____)_____-_____
- ❑ My mobile phone number is now: (____)_____-_____
- ❑ I have a new e-mail address, it is:_____
- ❑ I have a new financial advisor or accountant (contact information noted below)

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7. Comments or feedback:

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****Please Return to lauren@lifedesignlaw.com by 11/13/20****