

## NOTICE

The sole purpose for this Asset Organizer Workbook is to provide information that can be used for a professional analysis of the nature of your assets as it relates to the funding of your Revocable Living Trust. Unless you properly fund your assets into your Living Trust you run the risk of improperly funded assets having to go through the probate process and incurring substantial legal costs and delays. This workbook information will be used to guide and notify you of changes in the law that could affect your Living Trust. Although the actual funding of assets to your Living Trust is entirely your responsibility and does not legally bind Heritage Living Trust to that process, we never-the-less make every effort to provide information and support to help you keep your Living Trust current. Your Heritage Living Trust includes free help and support and free amendments for the life of your trust should you need to make changes in your Living Trust. We encourage you to use these services to assure a valid and effective trust. Therefore, we are asking that you authorize your estate planning professional to contact you from time to time with updated information and other notifications which may affect your Living Trust documents. You may be contacted annually for a review of your trust information to make any changes that may be necessary. This service is included in your original payment and you will never be charged for a review. Your estate planning professional may also contact you from time to time with information regarding the best products and solutions to enhance your Living Trust protection and to make your retirement years as secure as possible. You are, of course, never obligated or required to purchase any service or product he/she may suggest. Please sign the authorization below and feel free to contact us whenever you have a question.

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I/We understand that the estate planning professional who called on me/us, and Heritage Living Trust, is NOT a law firm or lawyer and cannot provide me/us with legal advice. I understand that no Heritage Living Trust affiliate or representative is engaged to act as my/our attorney for the purpose of executing, assisting, or funding my/our Living Trust documents. I/We also understand that I/we may be contacted from time to time to remind me/us of the importance of completing the funding of our Living Trust and to inquire about newly acquired assets for the purpose of updating my/our Living Trust. I/We understand this is a helpful reminder service and Heritage Living Trust and its affiliates are not responsible for the funding of my/our Living Trust documents. I understand that the information I/we have provided in this workbook is completely confidential.

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_