

PM TRUST REVIEW MEETING

Client Name: Brunsting, Nelva

Date: 07/30/10 Estate Size: 2 mil±

IRA: Husband - N/A Wife -

Signing Date & Time

Wed. Aug. 4th

2 pm

Fee:

Paid: Mail:

Current Address/Phone: 13630 Pinetrock Hwy TX 77079

Date of Trust/Restatement: Previous Amendments? Yes

Subtrust Funding Done previously? Yes. DT & ST

AMENDMENT: ☒ QBD(PAT) ☐ Other ☐ Instr Ltr ☒ HCPOA

☒ ApptSUCCTee/HIPAA ☐ ExtPOA ☒ COT ☒ POA ☐ DIR

Anita Kay Riley & Army Ruth... Co-tees
or Successor of them. Then Trust

☒ Distribution Change (QBD):

PAT QBD

IF PAT QBD then:

Each beneficiary Trustee of Own Trust: ☒ yes ☐ no

except for Carl, Anita & Armie as Co-tees for Carl
(except they have it to name, Carl as owner)
Distribution of PAT: need to Low Succ Tee

Same as LT except need language
about the last amend (QBD) less early distr.

____ Specific Distribution:

____ Ultimate Distribution:

HEALTH CARE DOCUMENTS:

1ST Agent: Carol

2nd Agent: Anita

3rd Amy

IRA TRUST: ____ yes ____ no For whom? ____ husband ____ wife

Trustees upon disability of Trustor or spouse: _____

Each beneficiary Trustee of own trust? ____ yes ____ no

SS# of Surviving Spouse/Beneficiaries: _____

FUNDING:

Real Estate _____

Which property has NO MORTGAGE? _____

_____ Recording HS Deed

_____ Apply for HS Exemption

Tax-deferred Assets _____

_____ Bank & Brokerage Accounts

_____ Safe Deposit Box

_____ Life Insurance

_____ Stocks and Bonds

_____ Oil & Gas Interests

_____ Motor Vehicles

_____ Credit Union Accounts

_____ Sole Proprietorship Assets

_____ Partnership Interests

_____ Promissory Notes & Mortgages

_____ CDs

_____ Annuities

Additional Documents: _____

NOTES:

Needs new DFPDA order

Anita

Carol

Amy

Any Name Changes for children? _____ Any children Predecease? No.

If Yes, who: _____

FEES:

QUOTED: \$ _____ (Plus Expenses)

AMOUNT REC'D: None DATE: _____

BALANCE DUE: _____

DOCUBANK? _____

Cost Pat QBD 1200.

Hipaa Pkg 250 - med POA
D, F, P, O, A 150.-
Appt. of Succ TEE
New Card.

courtesy discount \$150.-

Cy

Anita - called
Carl has encephlytus
amendments to trust

Anita & Aimee as Co.tees

change list under ME

Carol

Anita

Aimee

financial P.O.a

Anita

Carol

Aimee

Amend to trust / PAT's w/ Aimee
to correct Supp Needs to be
Co.tees.
sp needs?