

# PM TRUST REVIEW MEETING

Signing Date & Time	
Wed. Aug. 4 <sup>th</sup>	
2 pm.	
Fee:	_____
Paid:	_____ Mail: _____

Client Name: Brunsting, Nelva

Date: 07/30/10 Estate Size: 2 mil±

IRA: Husband - N/A Wife - \_\_\_\_\_

Current Address/Phone: 13630 Pinerock 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  ExtTPOA  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 & Arnee as Co-tees for Carl  
(except they have rt 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 distrs.

\_\_\_\_\_ **Specific Distribution:**

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\_\_\_\_\_ **Ultimate Distribution:**

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\_\_\_\_\_ **HEALTH CARE DOCUMENTS:**

1<sup>ST</sup> Agent: Carol

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2<sup>nd</sup> Agent: Anita

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3<sup>rd</sup> Amy

**IRA TRUST:** \_\_\_\_\_ yes \_\_\_\_\_ no For whom? \_\_\_\_\_ husband \_\_\_\_\_ wife

Trustees upon disability of Trustor or spouse: \_\_\_\_\_

Each beneficiary Trustee of own trust? \_\_\_\_\_ yes \_\_\_\_\_ no

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**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 DFPOA 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 per 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 encephlytes

amendments to trust

Anita + Annice as Co-tees

change list under ME

Carol

Anita

Annice

financial P.O.A

Anita

Carol

Annice

Amend to trust / PAT's w/ Annice  
to consent Supp Needs to be

Co-tees.

Sp needs?