

2021 Beneficiary Maintenance Program
Annual Client Meeting
Client Response Form - **CONFIDENTIAL**

Name: _____
(Please Print)

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 withdrew money from my Inherited Trust this year and request a Promissory Note
- I have a special financial concern

- 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

- 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)
- I would like the Law Firm Social Worker to contact me

- I would like to enroll in DCS (secure portal) Yes No

- Other:

Comments or feedback:

****Please return to nicole@lifedesignlaw.com by 11/22/21****