Guardian
& Conservator
Program

Client Financial Information

<u>WITHOUT THIS INFORMATION WE WILL BE UNABLE TO PROCESS THE APPLICATION</u>

Does the client have any of the following items?

☐ Burial Plan or Trust

If checked, please provide documentation.

☐ Checking Accounts

If checked, please provide a current bank statement for the account. If unavailable, provide the balance amount.

☐ Savings Accounts

If checked, please provide a current bank statement for the account. If unavailable, provide the balance amount

☐ Nursing Home Trust Account

If checked, please provide a current balance amount

☐ Certificates of Deposit

If checked, please provide a current bank statement for the C.D. If unavailable, provide the balance amount

☐ Investments (including stocks, bonds, annuities etc.)

If checked, please provide a current statement. If unavailable, please provide names of investments and amounts.

☐ IRS/401K/Pension

If checked, please provide documentation. If unavailable, please provide names and amounts.

☐ Miller Trust

If checked, provide name of Trustee

☐ Other Trust

If checked, please provide documentation of the trust including amounts.

☐ Life Insurance

If checked, please provide documentation of policy

☐ Real Property (includes land, homes, vacation homes, rentals)

If checked, please provide address and descriptions of property:

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☐ Personal Property (including cars, trucks, boats, trailers, antiques etc.

If checked, please provide a description and worth of each item:

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☐ Pending funds from a settlement, probate or other source

If checked, please describe the source and amount of the funds:

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☐ Other (funds not described above)

If checked, please describe in details including amounts:

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PLEASE NOTE THESE PROGRAMS CHARGE FEES. ASK FOR A FEE SCHEDULE IF YOU ARE CONCERNED ABOUT THE FEES THAT WILL BE CHARGED