

Superior Paralegal
Funding Service Transmittal Form
(Send to Heritage America)

Member Name: _____ Spouse: _____

SS#: _____ SS#: _____

Address: _____ City: _____

State: _____ ZIP: _____ Phone #: (____) _____

Representative: _____ Phone #: (____) _____

Rep. Address _____

Rep. City _____ Rep. State _____ Rep. Zip _____

Name of Trust: _____ Date of Signing: ____/____/____

Included are copies of:

- Signed Memorandum of Trust & Declaration of Intent
- Bank Statements for each account
- Retirement Account documentation
- Investment Account statements
- Stock Certificates
- Treasury Notes & Bonds
- Policy Statement page from Life Insurance/Annuity policies
- Partnership or other Business formation papers
- Descriptions of valuable personal property such as collections, antiques, vintage vehicles, etc.

The Superior Paralegal Funding Package Includes:

- Up to 15 separate funding letters, which may include:
 - Bank Accounts (checking, savings, passbooks, CDs, etc.); Retirement Accounts (change of beneficiary designations); Investment Accounts; Life Insurance or Annuity Policies (includes ownership transfer as well as beneficiary designation); Stocks held outside of an Investment Account; Treasury Accounts (Treasury Notes and/or Bonds)
- Preparation of the Trust Schedules

Cost - \$150.00

If more than 15 separate funding letters are required they are at a cost of \$10.00 each.