ARIZONA REALTY & LAW

CONGRATULATIONS!

YOU HAVE MADE ONE OF THE MOST VALUABLE DECISIONS IN YOUR LIFETIME.

YOU HAVE PROTECTED YOURSELF, YOUR FAMILY AND YOUR ASSETS FROM:

– PROBATE

– POTENTIAL HIGH COSTS AND TAXES

– LENGTHY TIME DELAYS

– EMOTIONAL HARDSHIPS FROM LACK OF PLANNING

– UNDEFINED PERSONAL, MEDICAL AND HEALTH CARE DECISIONS

IF YOUR ESTATE IS OVER THE FEDERAL GUIDELINES YOU HAVE MINIMIZED YOUR: FEDERAL ESTATE (DEATH) TAXES.

520.333.3345

5401 N. Oracle Rd.
Tucson AZ 85704

www.AzRealtyandLaw.com

We here at Arizona Realty and Law consider it an honor and our responsibility to help protect your hard-earned assets. Our expertise is always here to serve you. Take advantage of us and our experience.

Please find your “List Of Assets and Beneficiary” forms enclosed. These forms are very simple to fill out and should take you no more than one hour to complete. If you need help filling them out, please call us immediately and we will help you fill them out over the phone. Please do not hesitate in filling these forms out. Sadly, a few of our families each year attend a presentation and purchase their estate plan and never get the forms filled out before passing away unexpectedly.

The procedure for completing your List of Assets and Beneficiary Form is as follows:

1. Fill out the forms you were given and immediately mail these completed forms with copies of grant deeds, your last property tax bill, death certificates and any other applicable documents to our corporate office. The attorney must have these items in your case file before finishing your Trust and estate plan. **Please DO NOT send original legal or financial documents!**

2. If you should have any questions regarding the List Of Assets and Beneficiary forms, or need assistance before you have spoken with an ESG team member, call **Arizona Realty and Law at (520) 333-3345.**

3. A team member will call you to discuss your individual needs, goals and desires for your Trust.

4. Upon receipt of the above disclosures and copies, an attorney from **Arizona Realty and Law** will complete your Trust.

Upon completion, a representative will set an appointment to meet you to deliver the entire Trust portfolio and to notarize the necessary documents for recording. This meeting will generally occur within three to five weeks of completion of your Estate Plan.

We thank you for your confidence. If any changes are needed in the future, we are only a phone call away from providing them. We look forward to serving you and your family for the many years to come.

Arizona Realty and Law