
**ESTATE PLANNING PORTFOLIO
FOR
JOHN AARON SMITH AND JANE MARIE
SMITH**

Law Offices of Rozsa Gyene
450 N Brand Blvd, Suite 600
Glendale, California 91203

TABLE OF CONTENTS

This portfolio serves as a recordkeeping system for your estate plan: it contains every document that your successor Trustees and agents will need to follow your instructions. The portfolio is organized as follows:

Introduction	Information about your estate planning portfolio.
Overview	A written summary or diagram of your Revocable Living Trust plan.
Revocable Living Trust	Your Revocable Living Trust, as most recently amended or restated.
Will	Your Will that transfers to your Revocable Living Trust any assets that you do not transfer to it during your life.
Nominations	Names of persons appointed to act on your behalf in various capacities.
Personal Information	The most recent personal and financial information that you have provided to us.
Funding Instructions	Instructions that explain how to transfer your assets to your Revocable Living Trust and how to name your Revocable Living Trust as your beneficiary.
Power of Attorney	A document that authorizes your agent to transfer property to your Revocable Living Trust and manage your financial affairs if you become unable to manage them yourself.
Certificate of Trust	A document that you can give to financial institutions and others when they request a copy of your Revocable Living Trust. This keeps the personal and financial information in your Revocable Living Trust private.
Trust Assets	Proof of every asset transfer to your Revocable Living Trust and every designation of your Revocable Living Trust as your beneficiary.
Health Care	Your Authorization for Release of Protected