

**FIRST LEGACY CORPORATION**  
**Independent Sales Rep (ISR) / New Client INTAKE FORM**

ISR Name (Print): \_\_\_\_\_ Date: \_\_\_\_\_

Client Name (Print): \_\_\_\_\_ Date: \_\_\_\_\_

**Type of Estate Planning Services Requested**

Please mark the appropriate service

- ☐ Living Trust Portfolio (*Legal Plan, Will(s), Durable Powers of Attorney(s) Included*)  
☐ Trust Review & Possible Restatement (*extra cost, must have a copy of existing Trust*)  
☐ Trust Review & Revoke Existing Trust (*extra cost, must have copy of existing Trust*)

If this is a **Trust Review**, what is the reason we are having the Attorney review this Trust?

\_\_\_\_\_

- ☐ Copy of Trust Attached  
☐ Client to send copy of Trust  
☐ Other \_\_\_\_\_  
☐ AmeriCare Program– Estate Planning Services Authorization submitted and Total Fee remitted.  
Delivery and Notarization service requested from AmeriEstate for fee (withheld from commission).

**Deed Preparation:**

- ☐ Client **is not** paying separately for Deed Prep. Fee is **included** in the **Total Fee**.  
☐ Client **is** paying separately for Deed Prep. Fee  
☐ Deed(s) to be ordered (\$25.00 ea.)  
☐ ISR to pay for deed order fee(s) ☐ Client to pay for deed order fee(s)  
☐ ISR to send deed (s) within 7 days ☐ Client to send deed (s) within 7 days

*Deed recording fee(s) are billed to the client and collected at time of delivery.*

**Deed Requirements: A current \*\*Warranty Deed, Grant Deed, Quitclaim Deed, Deed of Gift or Affidavit of Death with complete, legible legal description of property.** If the client has sold a portion of the property and has not updated the legal description, please contact a surveyor to draw up a new legal description. **Deceased party (ies) listed on the title of the deed will need a Certified Death Certificate (required by the county) and will need an Affidavit of Death to be filled.**

**\*\*We cannot use: Deeds of Trust or Deeds of Reconveyance. These deeds are from a Bank or a Loan Company, the parties on title for these deed types do not accurately reflect the vesting of client.**

**Assignment Preparation:**

- ☐ Assignments *please circle type of Assignment to prepare*  
Sole Proprietorship / Corporation / LLC-general or limited / Promissory Note / Letter of Revocation  
Other \_\_\_\_\_  
Name of Business \_\_\_\_\_ Tax Id. # \_\_\_\_\_ Location \_\_\_\_\_

**Follow up for documents needed to provide Estate Planning services requested:**

- ☐ AmeriEstate has permission to contact client for any missing documents  
☐ ISR to contact client for any missing documents

Notes: \_\_\_\_\_

**(Please keep in mind the Total Commission will be paid after AmeriEstate has received the Total Fee)**  
*We appreciate your business and look forward to working with you. Please feel free to contact us with any questions or concern: (800) 235-0963.*