

**AmeriEstate Legal Plan, Inc.**  
**New Client Application Submittal**

Client Name:	Sales Rep:	Date:
Delivery / Notary Service by: <input type="checkbox"/> Writing Sales Rep <input type="checkbox"/> AmeriEstate <input type="checkbox"/> Other _____ <i>(For AmeriEstate Delivery &amp; Notary Service, delivery fee will be deducted from commission)</i>		

**Type of Estate Planning Services Requested**

- Living Trust Portfolio (*Legal Plan, Trust, Pour-Over Will(s), Powers of Attorney, AHCD, Estate Organizer*)
- Will Portfolio (*Legal Plan, Last Will & Testament, Powers of Attorney, AHCD, Estate Organizer*)
- Powers of Attorney & AHCD only for Single Person (*included with Legal Plan Membership*)
- Powers of Attorney & AHCD only for Couple (*included for Primary Legal Plan Member, second set extra*)
- Trust Review and Restatement to Living Trust Portfolio (*must submit copy of existing trust*)
- Irrevocable Life Insurance Trust (*ILIT*)
- Charitable Remainder Trust
- Add Stand Alone HIPAA Amendment to existing Trust

**Administrative Services Requested**

- AmeriCare Service- *AmeriEstate to complete initial educational consultation and fact finder, \*delivery also available for fee. Submit client(s) Legal Plan enrollment and Estate Planning Services Agreement with Fee.*

**Ancillary Documents Being Submitted**

- Copy of Existing Trust
- Certified Death Certificate (primarily used for removing a deceased person from title to Real Estate)
- Other [*describe:* \_\_\_\_\_]
- Deeds [ ] # submitted with app [ ] # to be provided by client [ ] # to be ordered by AmeriEstate  
**Submit a current Grant Deed, QuitClaim Deed, Warranty Deed, Indenture Deed + Affidavit of Death of Joint Tenant (if appl)**

*For deeds to be ordered by AmeriEstate, please provide the following: (use additional page if needed)*

Property Address	County
Property Address	County
Property Address	County

- Assignments:** Check any that apply [ ] Sole Proprietorship [ ] Corporation [ ] LLC [ ] Partnership  
[ ] Vessel [ ] Intellectual Property [ ] Other (*Please include details on estate planning fact finder*)

**Fees Charged & Collected**

**Legend of AmeriEstate Fees**

#	Service Requested	Client Charges (Retail)	Service Item	ISR Cost
	Estate Plan	\$	Deed Prep	\$95
	Deed Prep	\$	Deed Retrieval	\$25
	Deed Retrieval Fees	\$	Assignments	\$95
	Assignments	\$	Rush Fees (1 Week / 2 Weeks)	\$300 / \$200
	Delivery Fee	\$	Delivery & Notary Service	\$200
	Other	\$	Stand Alone HIPAA Amendment to Trust	\$95
	<b>Total Charges</b>	\$	Individual Power of Attorney (Asset Mgt)	\$75
	<b>Amount Collected</b>	\$	Individual Advance Health Care Directive	\$75
	Recording Fees	Billed to client @ delivery		