CLAIM MY LEGACY™

Trust Funding Request Tracker™

REQUEST - Step 3 of the Trust Funding Assistance System™

Use this tracker after REVIEW to document each request for information, forms, instructions, or professional guidance. The purpose of REQUEST is to obtain what you need before taking action. Do not change ownership, registration, or beneficiary designations simply because a form has been received.

REQUEST SUMMARY

Family / Trust Name		**Date Started**	
Prepared By		**Review Worksheet Date**	

REQUEST TRACKER

Asset / Account	Institution / Record Keeper	Last 4 Digits	What Is Needed

Trust Funding Request Tracker™ - Request Details

Record the details of each request so you know what was asked, what was received, and what still requires follow-up.

Date Requested	How Requested	Contact / Department	Response / Forms Received	Follow-Up Needed?

MY NEXT STEP

Asset / Account	Next Step	Status / Date

BEFORE MOVING TO SUBMIT

Confirm that you have received or identified the information, forms, instructions, or professional guidance needed for each item. REQUEST is complete when you know what must be submitted or what action is appropriate. Keep copies of correspondence and forms with your Trust Funding Assistance records.

REQUEST Complete? ■ Yes ■ Not Yet

Ready for SUBMIT? ■ Yes ■ Additional information needed