



CONTROL TRUST LLC RETAINER AGREEMENT

Dear CLIENT:

Thank you for choosing Control Trust LLC to prepare your Trust documents. **Our purpose is to provide an essential wealth building tool at a fair price.**

WE ARE LICENSED AND BONDED DOCUMENT PREPARERS.

State of Nevada NV20232679155

Western Surety Company- Bond # 66607923 \$50,000.00

Diane C. McDowell Registration #: NVDP20231236081 (5/2/2024 to 5/2/2025)

Jaime McDowell Registration #: NVDP20231316105 (5/2/2024 to 5/2/2025)

WE ARE NOT ATTORNEYS AUTHORIZED TO PRACTICE LAW IN ANY STATE.

WE ARE PROHIBITED BY LAW FROM PROVIDING LEGAL ADVICE OR LEGAL REPRESENTATION TO ANY PERSON.

OUR COMMUNICATIONS ARE NOT PROTECTED BY ATTORNEY-CLIENT PRIVILEGE.

Please **initial** to indicate your selected package:

____ **TAKE CONTROL TRUST** \$350.00 single/\$500.00 couple

NO DEEDED PROPERTY/ Fund with a bank account that you open in the name of your trust.

Documents included:

- Living Trust (including restatements)
- Pour-Over Wills
- Certificate of Trust
- Declaration of Trust
- Assignment of PERSONAL PROPERTY
- Instructions for the Distribution of Tangible PERSONAL PROPERTY
- Voluntary Advance Directive

9436 W. Lake Mead Blvd., Ste. 5 PMB 1173, Las Vegas, NV 89134

Website: www.controltrust.llc

Email: controltrustllc@gmail.com

Phone: 702-781-0009



- Minor's Power of Attorney
- Minor's Health Care Power
- General powers of attorney
- HIPAA compliant Health Care Directives with Living Will
- Stand-alone HIPAA Waivers
- Final Disposition (Burial) Instructions

_____ **PRIVACY TRUST** \$500.00 single/\$750.00 couple ONE DEEDED PROPERTY INCLUDED; \$150.00 per additional deeded property.

Documents included:

- Living Trust (including restatements)
- Pour-Over Wills
- Certificate of Trust
- Declaration of Trust
- Assignment of PERSONAL PROPERTY
- Instructions for the Distribution of Tangible PERSONAL PROPERTY
- Voluntary Advance Directive
- Minor's Power of Attorney
- Minor's Health Care Power
- General powers of attorney
- HIPAA compliant Health Care Directives with Living Will
- Stand-alone HIPAA Waivers
- Final Disposition (Burial) Instructions
- **Transfer Documents**
 - **State specific Deeds for REAL PROPERTY**
 - **Letters of Instruction for re-titling to banks, transfer agents, brokerage firms, mutual funds, etc.**
 - **Assignments of Deeds of Trust, limited and general partnership interests, business interests, etc.**
 - **Requests for change of beneficiary designations for life insurance, retirement benefits, etc.**
 - **Affidavits of death**

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_____ **REVISED TRUST** \$150.00 (only available to existing Control Trust LLC clients)

- Update/add/delete property (add \$150.00 per deeded property if Transfer Documents must be prepared)
- Change beneficiary/ies
- Change distribution
- Change Trustee/Successor Trustee

TOTAL FEE: \$ _____

PAYMENT STRUCTURE: \$100 NON-REFUNDABLE REGISTRATION FEE

\$100 UPON COMPLETION OF QUESTIONNAIRE. Your documents will be available for review and approval within 10 business days.

\$ _____ BALANCE DUE UPON DELIVERY OF FINAL DOCUMENT

EACH PACKAGE IS DELIVERED AS A PDF DOCUMENT: Client to **PRINT** and **NOTARIZE**.
ALL TRUSTS MUST BE FUNDED.

- CONTROL TRUSTS may be funded by simply opening a bank account in the name of the trust.
- PRIVACY TRUSTS are funded upon **recording** of deed(s) in the name of the trust.

Filing trust documents with the Court is NOT required. Provide **Certification of Trust** to Third Parties (your disposition of assets remains confidential). Keep in a safe place; make sure your successor trustee will have access to your trust documents.

Complaints:

NEVADA SECRETARY OF STATE TOLL FREE NUMBER 1(800)450-8594 (Option 6)

NEVADA STATE BAR ASSOCIATION 1(800)254-2797 www.nvbar.org

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We look forward to working with you as you embark on controlling your wealth. Thank you for choosing Control Trust LLC.

DATE: _____

Client Signature

Client Printed Name

Client Signature

Client Printed Name

Document Preparer Signature

Diane C. McDowell
Licensed Document Preparer
NVDP20231236081
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