The Estate Services Group
DISCLOSURE AND COMPLIANCE

The undersigned has provided information concerning his/her estate and finances to The Estate Services Group (hereinafter ESG) to facilitate the preparation of certain estate planning documents. That information was disclosed orally and in writing, including the Living Trust Information Questionnaire, by the undersigned to ESG.

Part of the "Full-Services" aspect in the preparation and delivery of your complete Revocable Living Trust from ESG includes being available to review your estate from a financial planning and asset preservation standpoint at no additional cost. In order to accomplish this on your behalf, we may involve outside professionals whose backgrounds include, but are not limited to: Estate Planning, Tax Advice, Real Estate and Insurance.

The undersigned has authorized ESG in its "Estate Plan/Trust/Document Preparation Agreement – Authorization Disclosures & Receipt" to disclose my/our information to the aforementioned professionals. Acknowledgement is again made that these individuals may not be attorneys, but Notary Publics, financial planners, insurance agents, Real Estate Agents and/or other licensed professionals.

These representatives, upon delivering my/our Living Trust Portfolio, may present and address a variety of financial planning strategies and issues to the undersigned for consideration.

Please initial one of the boxes below indicating your selection:

______ I/We choose to have my/our documents delivered to me/us for execution by an affiliated agent (non-ESG employee) who will notarize the documents and review the funding of the trust with me/us, but I/we must ask my/our attorney about any legal questions I/we may have. If I/we decide to make any funding changes, the agent can forward those to my/our attorney who will revise the documents accordingly.

______ The undersigned understands that he/she has the right to withhold such authorization and desires to do so, acknowledging that ESG will not include the "Full-Services" financial planning and asset preservation aspect in the preparation and delivery of my/our Trust. The undersigned also understands that I/we may request such services at a future time, but that there may be a fee for these services.

I/We understand that the Trust, as initially established, is revocable at any time by the Trustors. I/We understand that upon the death of the first Trustor, certain portions of the Trust may become irrevocable. I/We understand that ESG will assist in the funding of the trust. However, I/we are solely responsible for the transfer of all assets into my/our living trust. Upon request, ESG and/or the affiliated attorney who reviewed my/our living trust may provide additional funding assistance. Such additional assistance may incur additional fees.

Your Estate Plan is typically completed within three to five weeks. The undersigned is aware, entitled to, and was provided with a copy of this Disclosure Form. By signing below, I/We have read and fully understand the above.

______________________________________ ______________________________________

Client's Signature Date Spouse's Signature Date