



**Circle of Light Check-List**

***“House-In-Order”***

<b>1</b>	<b>HHCP Questionnaire Application – 2 pages</b>
<b>2</b>	<b>HHCP Bylaws – 4 pages</b>
<b>3</b>	<b>Financial Needs Analysis – 1-on-1 consultation</b>
<b>4</b>	<b>LexisNexis® Consumer Report</b>
<b>5</b>	<b>Last Will and Testament – 4 pages – Notary – two (2) witnesses</b>
<b>6</b>	<b>Living Will – 1 page – two (2) witnesses</b>
<b>7</b>	<b>Springing Durable Power of Attorney- 4 pages – Notary – two (2) witnesses</b>
<b>8</b>	<b>Living Trust Agreement</b>
<b>9</b>	<b>Certificate of Living Trust – 2 pages – Notary</b>
<b>10</b>	<b>Procedure at Death of Trustor – 1 or 2 pages</b>
<b>11</b>	<b>Declaration of Intent “Schedule A” – Notary</b>
<b>12</b>	<b>Trust Employer Identification Number (EIN)</b>
<b>13</b>	<b>Bank Settlement Trust Account – 10 pages – Notary</b>
<b>14</b>	<b>Certificate of Trust for Bank Settlement Bank Account – 1 page</b>
<b>15</b>	<b>Resume</b>
<b>17</b>	<b>Valid State Picture ID</b>
<b>18</b>	<b>Personal Passion Projects</b>
<b>19</b>	<b>Business Projects</b>