

FORMS ON ZIP DRIVE

FORMS TO USE DURING THE CLIENT INTERVIEW:

These are the only forms you will use when interviewing the client. They are very simple to fill out and you will have neat copies to give to the client to submit to their attorney if they wish. They are all in hard copy in the collaborator marketing manual.

- Assessment form
- Asset protection strategic planning form
- Client data option Form Option 2
- Client intake form
- Client interview form
- Collaborative Agreement Option 1
- Collaborative Agreement Option 2
- Lawsuit Exposure Marketing evaluation
- Scorecard Evaluation
- Value Proposition

FORMS WHICH ARE IN THE SAMPLE FORMS BOOK.

Do not be overwhelmed by the number of the forms. You need the land trust formation form, which is simple and easy to fill in, (There is very little actually to fill in. Most of the additional forms are one or two pages, but as the land trust has activities, they will be back with more business for the document preparer whether it be an attorney or an LDA.

- Beneficiary signing page
- Beneficiary agreement
- Amendment to land trust agreement
- Power of direction
- Assignment of beneficial interest
- Agreement to extend land trust
- Notice of resignation
- Notice of summons
- Acknowledge form
- Closing release
- Option Agreement
- Promissory Note
- Collateral Assignment of Beneficiary
- Memorandum Notes Form

ADDITIONAL

Napoleon Hill's 225 page "Think and Grow Rich" (uncopyrighted version).

Troika—Business Networking Form