

## 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