
Receipt for Documents

The following documents are received this ___ day of _____, 20___, for the purpose of study and analysis for _____. It is understood that this material will be treated confidentially and returned as soon as the review process is completed, or sooner if requested.

Reviewer's Signature: _____

Address: _____ Phone No: _____

Items Received

Wills

___ Client Dated _____ ___ Spouse Dated _____

Trust agreements

Type: _____ Dated: _____

Type: _____ Dated: _____

Business agreements

Type: _____ Dated: _____

Type: _____ Dated: _____

Insurance and annuity contracts

Company	Policy No.	Company	Policy No.
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Receipt for Documents

Mutual Fund, Brokerage and 401(k) Account Statements (list companies)

Other Statements (list companies)

The policies and documents for which the above receipt was given have been returned to me.

Date: _____ Client Signature: _____