

# ***My LifeCard Plan® Processing Options***

The revolutionary **MLCP** platform offers powerful and timesaving ESTATE PLANNING methods for ALL registered users. A Living Trust Estate Plan can be established entirely **ONLINE** with amazing ease, complete accuracy, and no delays – with full telephonic support available through MLCP’s Client Management Services (CMS) offices.

MLCP dynamics enable clients to create personalized Revocable Living Trust estate plans under Nevada’s favorable PRO-TRUST laws, which fully recognize the procedures defined below in the “**Best Practices**” setup process. After the client’s personalized data is entered, the documents are *auto-generated* by the clicking of a button and then recorded in the MLCP Client Console. After a review, the next step is for the client to **electronically sign** the Trust Estate Plan, which will establish an *effective* trust date.

## ***Best Practices – 100% Online Implementation***

1. Applicable data is entered in the Funding Kit Asset Ledgers
2. The completed Asset Ledgers are then E-Signed
3. The Medical Directives are filled out and E-Signed (Could be printed, signed and notarized)\*
4. The Master Signatory Guarantor (MSG) form needs to be (i) printed, (ii) physically signed with a Notary Public, and then (iii) scanned & uploaded to the E-Vault
5. For co-users, the Disclosure Notice (DN) is (i) printed, (ii) physically signed and notarized, (iii) scanned and uploaded to the E-Vault and (iv) registered
6. Create Trustee Login password

## ***First Alternative – Online w/Implementation Pages Signed & Uploaded***

~ Applicable for “Physical” Signatures on ALL Documents ~

1. Bundled Implementation Pages are printed, signed and notarized\*
2. Addendums (if any) are printed, signed and notarized\*
3. The Funding Kit electronic Asset Schedule Ledgers are completed
4. The Asset Ledgers are then E-Signed
5. The Medical Directives are completed and E-Signed (Could be printed, signed and notarized)\*
6. The Master Signatory Guarantor, (MSG) form needs to be (i) printed, (ii) physically signed and notarized and then (iii) scanned and uploaded to the E-Vault
7. If married, the Disclosure Notice (DN) is (i) printed (ii) physically signed and notarized, (iii) scanned and uploaded to the E-Vault, and then (iv) registered
8. Create Trustee Login password

## ***Second Alternative – Print w/Traditional Implementation***

~ Applicable for Printing Documents ONLY ~

1. Portfolio is printed, signed and notarized \*
2. Addendums are printed and signed and notarized\*
3. Affidavit of Witnesses forms printed, signed and notarized\*
4. The Medical Directives are completed, printed, signed and notarized\*
5. A Trust Transfer Deed may be prepared @ \$95 per deed - ‘**Realty Transfer**’ assets\*
6. A Request for Retitlement form is provided in Funding Kit - ‘**Asset Transfer**’ assets\*
7. A generic Change of Beneficiary form is provided in Funding Kit - ‘**Asset Payable**’ assets\*
8. Create Trustee Login password

\* ***This Item should be scanned and uploaded to Client Console E-Vault for permanent storage***