



Featuring Trusts From:
"Integrated Trust Systems"

This is Easy!

**COMPLETE STEPS ONE AND TWO FOR FAST QUALITY SERVICE
AND DELIVERY OF YOUR LIVING TRUST**

**Read the "Retainer/Contract, Appointment, & Waiver- Form"
and sign at the bottom!**

1. In the Integrated Trusts Systems – **Retainer/Contract, Appointment, & Waiver** form, you and your spouse sign **X** areas. There are **2** signatures required. Please count **2**.
2. Enclose a check for **\$2,250.00** made payable to **"Integrated Trust Systems"**. The total cost is **\$2,250.00** plus normal notary and recording fees to be paid later. A credit card from Visa, MasterCard, or Discover may be used. Please fill in account #'s below.
Don't forget the three digit **ID #** on the back of the card.

Credit Card #: _____ 3 digit ID #: _____ Exp. Date: _____

If a credit card is used please also return this page along with retainer form
including two signatures.

Note: The legal documents are designed with legal conformity and are "state specific".

This is a special limited-time offer!

**Please send your signed application with your check or credit card #
Via Fax 510-237-4555 or mail to the Itech Corp. P.O. Box 397 Point Richmond, CA 94807**

AS THIS IS TIME DATED MATERIAL

A PROMPT RETURN IS IMPORTANT TO MAINTAIN YOUR PRICE!

Thank you for your business. We look forward to doing our part.

Respectfully,
Larry Laurence
Chairman, Itech Corporation



ON SAN FRANCISCO BAY
1160 Brickyard Cove Rd, Suite 102, Point Richmond, California, 94801
Mailing Address: P.O. Box 397, Point Richmond, California 94807-0397
Toll Free: (800) 400-4832 Telephone: (510) 237-3755 Fax: (510) 237-4555
<http://www.livingtrustcenter.com> CA LICENSE #0811866



INTEGRATED TRUST SYSTEMS

– Retainer/Contract, Appointment, & Waiver –

I, _____, the undersigned Client, hereby give notice of my intent to retain the estate-planning coordinating services of *Integrated Trust Systems (ITS)*, a business registrant in the States of Arizona and Minnesota for a fee of **\$2,250** per the introduction material received with this form.

I hereby authorize **ITS**, working in conjunction with **Itech Corporation**, to request, collect, and record certain information for appropriate fact-finding purposes to facilitate the implementation of my proposed estate plan. I also appoint **ITS**, working in conjunction with **Itech Corporation**, as my *liaison-agent-in-fact* to act on my behalf for the purposes of (i) forwarding all correspondence to and (ii) receiving all correspondence from my legal counsel (as may be necessary) on my behalf and/or on behalf of my estate and to assist in the implementation and funding of my estate plan.

Further, I retain the services of ITS Staff Attorney, **John Hatling** – Minnesota State Bar License #167530 – through part of the fee paid herein, to conduct a brief **“suitability determination”** on my behalf by performing a document(s) review and drafting services (as necessary) as my *intermediary legal counsel* for establishing my personal estate plan through **ITS** (notwithstanding that Mr. Hatling is statutorily unable to provide direct/final legal counsel pertaining to estate plans administered outside Minnesota jurisdiction). I can understand that a possible conflict of interest may exist pertaining to the connectivity between **ITS** and Mr. Hatling solely because he is also legal counsel to **ITS**. I accept the possible conflict of interest and expressly waive any right, or the right of my estate, to challenge it.

I understand that any language, strategies, or methods that may be used in conjunction with or within any **ITS** trust/product that may be designed to help prevent a spend-down of my assets by any government agency or creditor are NOT, and CANNOT BE, guaranteed in any event by **ITS, or Itech Corporation**, or anyone else associated with this contract, to prevent any such spend-down or creditor exposure.

I understand that if, **within twelve (12) months from the above date**, my own personal, statutory, legal counsel (whom I may choose at a later date) determines by a written legal opinion, presented and signed on his/her letterhead, that my forthcoming living trust estate plan is not applicable or suitable to meet my personal estate planning goals/objectives nor the requirements of the laws of my State of domicile (or the State under whose laws I may direct to have my trust administered) and cannot be altered sufficiently to meet any such determined requirements, then **I shall receive a full refund of any monies I may have paid relative to this Retainer Notice.**

Date

X _____
Client Signature

Date

X _____
Spouse’s Signature

