

ATTENTION BENEFICIARIES!!!

STOP!

Please do **NOTHING** with these accounts until you meet
and speak with **[ADVISOR NAME]**, located at:

[FIRM NAME]

[Address Line]

[Address Line]

[Phone Number]

If handled incorrectly, the distribution to you from these accounts can be
drastically reduced by unnecessary tax.

[ADVISOR NAME] has agreed to meet with the family, free of charge.

It is my wish that you call him and follow his expert advice.

Signed By: _____ Date: _____

Signed By: _____ Date: _____