

# Trust Setup Services

- IRA Trust Setup \_\_\_\_\_ \$200.00
- Land Trust Setup \_\_\_\_\_ \$250.00

Note: Prices above are for standard orders.

- Consultation with Jack Shea \_\_\_\_\_ \$200.00 per hour

## Disclaimer

These services offered with the understanding that neither the publisher nor the author is engaged in rendering legal, accounting or other professional services. If legal advice, or other expert assistance is required, the services of a competent professional person should be retained.

We make it as easy as 1. 2. 3.

1. Plan for the Trust – Fill out information forms with your chosen names and beneficiaries.
2. Send us your information sheet – This can be done via email, fax, or mail.
3. We will send you the Completed Trust Documents

Investors can rely on Keys Capital Inc. with Jack Shea CES® (Certified Exchange Specialist), Daniel Imbior CES® (Certified Exchange Specialist), and qualified others to provide you this service with ease, peace of mind, security, and most importantly **TAX SAVINGS!**

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Clearwater, FL 33756

# Land Trust Data Sheet

The undersigned makes application to Keys Capital, Inc. to set up a land trust as follows:

Beneficiaries of the trust:

- Set up with husband and wife 100% in tenancy by the entireties

\_\_\_\_\_% Name \_\_\_\_\_ SS# \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_  
State \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_  
Email address \_\_\_\_\_  
Successor(s) \_\_\_\_\_ SS# \_\_\_\_\_  
Address \_\_\_\_\_ Phone \_\_\_\_\_

\_\_\_\_\_% Name \_\_\_\_\_ SS# \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_  
State \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_  
Email address \_\_\_\_\_  
Successor(s) \_\_\_\_\_ SS# \_\_\_\_\_  
Address \_\_\_\_\_ Phone \_\_\_\_\_

**Trustee Info** \_\_\_\_\_ SS# \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_  
State \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_  
Email address \_\_\_\_\_  
Successor Trustee \_\_\_\_\_ SS# \_\_\_\_\_  
Address \_\_\_\_\_ Phone \_\_\_\_\_

Street address of property \_\_\_\_\_

Legal description \_\_\_\_\_

\_\_\_\_\_  
Tax parcel # \_\_\_\_\_ County \_\_\_\_\_

Mortgagee \_\_\_\_\_ Loan # \_\_\_\_\_

Address \_\_\_\_\_ Balance \_\_\_\_\_ \*

Second mortgagee \_\_\_\_\_ Loan # \_\_\_\_\_

Address \_\_\_\_\_ Balance \_\_\_\_\_ \*

Third mortgagee \_\_\_\_\_ Loan # \_\_\_\_\_

Address \_\_\_\_\_ Balance \_\_\_\_\_ \*

I/we certify that the above information is true, that the land trust is not being set up for any illegal or criminal purpose, and that I am/we are U.S. residents for tax purposes.

\_\_\_\_\_  
Beneficiary  
Print name \_\_\_\_\_

\_\_\_\_\_  
Beneficiary  
Print name \_\_\_\_\_