

Name: \_\_\_\_\_

# Trusted Wealth Reception Advisor™ Survey

Definition; Your relationship with this advisor is so strong that you consider his or her advice an asset you'd like to pass along as part of your wisdom and wealth.

Name	Company	Phone	email
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Accounting

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Insurance Advisor

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Investment Advisor

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Financial Planner

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Other (Please specify: \_\_\_\_\_ )

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Note: Your Trust will be amended to provide instructions to your trustee to work with these advisors.