

Complete this form and fax to (818) 843-3489 for a

FREE LISTING

**CALIFORNIA
BROKER**

2010 DIRECTORY

To: _____

Fax: _____

217 E. Alameda Ave., Ste. 301 • Burbank, CA 91502
(818) 848-2957 Ext. 16 • Fax (818) 843-3489
Email: directory@calbrokermag.com

Trust Services Form

Company Name: _____

Contact Person (name required): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Toll Free: _____

Fax: _____

Email1: _____

Email2: _____

Web Site: _____

Serving: _____

Trust Services Offered:

(Please check all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Revocable Living Trusts | <input type="checkbox"/> Investment Administration |
| <input type="checkbox"/> Irrevocable/Charitable Trusts | <input type="checkbox"/> Investment Advice |
| <input type="checkbox"/> Life Insurance Trust | <input type="checkbox"/> Rabbi Trust |
| <input type="checkbox"/> Self-Directed IRA Trustee/Custodian | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Qualified Business Plan Trustee/Custodian | <input type="checkbox"/> Fee-Based Consulting |
| <input type="checkbox"/> Pension Administration (Def. Benefit) | <input type="checkbox"/> 403 (b) |
| <input type="checkbox"/> Pension Administration (Def. Contribution) | <input type="checkbox"/> Sep - IRA |
| <input type="checkbox"/> Employee Stock Ownership | <input type="checkbox"/> Simple - IRA |
| | <input type="checkbox"/> Roth - IRA |

Fax Completed Questionnaire to (818) 843-3489

Or Email: directory@calbrokermag.com

For more information call Scott Halversen (818) 848-2957 ext. 16

Person Completing Questionnaire: _____

Email: _____ Phone: _____