



TRAIL Associates

[www.trailassociates.com](http://www.trailassociates.com)

### **ANNUITY NECESSARY DOCUMENTATION**

The following is a list of the documentation or items that will be required for the successful completion and release of payment for Annuity transactions.

#### **Annuity Information Checklist**

- \_\_\_ Client's name
- \_\_\_ Client's address
- \_\_\_ Client's telephone
- \_\_\_ Settlement Agreement
- \_\_\_ Annuity Contract or Letter of Benefits

\*\* Please note that there may be additional requests if necessary to properly process and complete the transaction

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Partnering for Success

6294 Glen Court - Germansville, PA 18053 - 610.760.2724