

## SETTLEMENTS 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 Settlement transactions.

### Settlements 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