

# ORDER FORM

## **The Wealth Preservation Fortress®**

CLIENT: \_\_\_\_\_

DATE: \_\_\_\_\_, 20\_\_

ADDRESS: \_\_\_\_\_

BUS. PHONE: \_\_\_\_\_

FAX: \_\_\_\_\_

EMAIL: \_\_\_\_\_

OTHER: \_\_\_\_\_

I agree to retain Alexander John Hay, Attorney to provide the following services:

SERVICE	COST OF SET UP	MAINTENANCE COSTS	TO ORDER PLEASE CIRCLE
<p><b><i>The Personal Preservation Fortress®</i></b> Includes <i>The Personal Preservation Trust®</i>, <i>The Personal Preservation LLC®</i>, Federal EIN, all necessary transfers, and all maintenance costs for the first year.</p>	\$5,000.00	Annual Trustee Fee: \$1,000.00 Registered Agent: \$250.00 Annual Manager: \$500.00 (if necessary) Annual Government Fee: Will Depend upon the State.	<b>YES</b>
<p><b><i>The Advanced Corporate Fortress®</i></b> Includes a US C Corporation (or LLC to be treated as a US C Corporation), a US LLC to operate as a wholly owned subsidiary of the US C Corporation, and a US S Corporation (or LLC to be treated as a US S Corporation) to serve as the clients payroll service, Federal EIN for all, all filings to qualify for IRS S Corporation status, all necessary transfers, and all maintenance costs for the first year.</p>	\$5,000.00	Registered Agent: \$500.00 Annual Manager: \$500.00 (if necessary) Annual Government Fee: Will Depend upon the State.	<b>YES</b>
<p><b><i>The Ultimate Wealth Preservation Fortress®</i></b> Includes a combination of <i>The Personal Preservation Fortress®</i> and <i>The Advanced Corporate Fortress®</i> saving the client the expense of the formation of a US LLC. Instead the US C Corporation established by <i>The Advanced Corporate Fortress®</i> replaces the US LLC established by <i>The Personal Preservation Fortrrs®</i>. This savings is passed on to the client.</p>	\$9,000.00	Annual Trustee Fee: \$1,000.00 Registered Agent: \$500.00 Annual Manager: \$500.00 (if necessary) Annual Government Fee: Will Depend upon the State.	<b>YES</b>
<p><b><i>The S Corporation Basic Setup</i></b> Sometimes all that is needed is a simple S Corporation. Includes a corporation or LLC, Federal EIN, all filings to qualify for IRS S Corporation status, and all maintenance costs for the first year.</p>	\$2,000.00	Registered Agent: \$250.00 Annual Manager: \$500.00 (if necessary) Annual Government Fee: Will Depend upon the State.	<b>YES</b>
<p><b><i>Establish Bank Account</i></b> Includes establishing checking account in the name of the company, basic check book, online banking, Visa Debit Card. Does not include initial deposit which will vary.</p>	\$1,000.00	None	<b>YES</b>

I acknowledge and agree to the above fee arrangement:

X \_\_\_\_\_

CLIENT SIGNATURE

### **PAYMENT INSTRUCTIONS**

- Print document and complete data in clear block letters. Then sign.
- Fax to Alexander John Hay, Attorney at: 419-710-4339 (USA Number), or scan and email to ahay@alexander-hay.com.
- Upon receipt of fax or meail we will send you an invoice with payment instructions and more information on formation procedures.
- Upon receipt of final payment we will confirm and complete the package with any additional details required as requested.

### **MISCELLANEOUS**

1. Work foreseen in this agreement will include only the preparation of the paperwork, telephone calls, and shipping and delivery of documents.
2. This case is being accepted subject to review by supervising consultant. Upon review it may be declined. If declined, any fees accepted will be refunded.
3. The retainer is non-refundable and represents the minimum fee for accepting this case. Failure to keep account up to date may result in withdrawal of representation by consultant.
4. Client shall keep consultant informed of any changes of address and/or phone numbers.
5. Client must respond within a reasonable time to requests for information, documents, etc.

**NOTE: This system may not provide immediately asset protection if there are prior creditors and liabilities. It would be best if the system was in place before such liabilities are incurred rather than after. Otherwise, there may be a time period before the transfers are safe from creditors, depending upon state laws and regulations. If you intend to sell certain real property, these systems may be inappropriate.**