EXHIBIT G

DOCUMENTS RECEIPT

The documents identified below have been received from:

____
Client Name

All documents collected will be returned to you upon completion of the planning process or upon your request.

Documents Received:

Wills

Owner:________________________________

Owner:________________________________

Trust Documents

Type of Trust:______________________ Owner:___________________________

Type of Trust:______________________ Owner:___________________________

Addendum to Wills or Trusts

Owner:______________________________

Owner:______________________________

Tax Returns

Year	Federal	State
____________________	_______	_______
____________________	_______	_______
____________________	_______	_______

Exhibit G - continued

Fixed or Variable Annuity Policies

Annuity Policy	Policy Number
______________________________	_________________________
______________________________	_________________________
______________________________	_________________________

Insurance Policies

Insurance Company	Policy Number
______________________________	_________________________
______________________________	_________________________
______________________________	_________________________
______________________________	_________________________

Other Documents (i.e., bank statements, brokerage account statements, etc.)

____

____

I acknowledge the documents identified above have been delivered to my Vera Advisor.

Client Signature:___________________________________
Date:_____________________

Client Signature:___________________________________
Date:_____________________

I acknowledge the documents identified above have been returned to me.

Client Signature:___________________________________
Date:_____________________

Client Signature:___________________________________
Date:_____________________