



Funding Order Form

Please complete this Funding Order Form to retain Simplified Outsource Solutions, LLC's funding services for a client matter. Please note that this Order Form is pursuant to scope of services outlined in the Services Agreement you have signed. By signing and returning this Order Form, you agree you are hiring Simplified Outsource Solutions, LLC for funding services for the client listed below. All fees are non-refundable and due once this work order is accepted.

Date Ordered: _____

Law Firm Name: _____

Client Name: _____

Type of Funding Service: FULL Funding Funding LITE Asset Report only

Trust is: Revocable Irrevocable

Trust will: use Grantor's SSN have own EIN; which is _____

Items to be provided to SOS to begin funding:

Client questionnaire (with basic vital information)

Financial information (completed questionnaire and complete statements)

Items to be provided after draft Asset Table provided to law firm:

Affidavit or Certificate of Trust (Signed copy)

Full copy of trust (we do not provide to companies but need to reference certain provisions to accurately complete funding forms)

Special contact information (i.e. if we are to work with a family member assisting the client, "client does not use email", etc.)

Signing considerations (if someone signing as Power of Attorney agent or any other particular considerations)

By signing this Work Request I understand that Simplified Outsource Solutions, LLC will begin work on my behalf and the funding price is non-refundable and due upon execution of this order.

Acknowledged By:

Law Firm Representative

Date