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	<u>Self Funding Packet</u>	<u>Full Funding</u>	<u>Client Direct Service</u>
Information Security ➤ All documents shredded onsite	•	•	•
Funding Action Asset Verification Table ➤ Provides a comprehensive listing of all funding actions to be performed by PBO	•	•	•
Custom Letters for Asset Transfer	•	•	•
Return Confirmation Letters	•	•	•
Form Research ➤ For infrequently used forms not maintained in our database		•	•
Financial Forms Generated and Ready for Client Signature ➤ All supplied data is entered onto the appropriate forms	Note 1	•	•
Client Form Completion Table ➤ Provides instructions for the completion of generated forms	•	•	•
Confirmation Service ➤ PBO tracks and confirms all Funding Actions have been completed as requested		•	•
Attorney Involvement	Minimal	Moderate	Minimal
PBO Point of Contact	Attorney/Firm or Client	Attorney/Firm	Client
Cost: Based on 6 Funding Actions	\$350.00	\$590.00	\$790.00

Note 1: Only those forms currently maintained in our database or those provided by the law office/client will be generated.