



RUSHFORTH
FIRM LTD. 
NEVADA TRUST ADVICE

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WEB SITES
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October 2021

RE: Transition to a New Trust-and-Estate Attorney,
Return of Original Documents

Dear Client:

CHOOSING A NEW TRUST-AND-ESTATE ATTORNEY

After serious consideration, I have decided that I will no longer be providing estate-planning or trust-administration services as my clients' primary attorney. Because of that, you will need to transition to a different trust-and-estate attorney or firm, and you also need to tell me where to send your file.

If you have already communicated to us the name of an attorney to whom your file should be sent, you may disregard the balance of this letter. If not, I invite you to find an experienced trust-and-estate attorney to advise you as to your estate planning and as to the administration of any trusts that you have created. Where your file goes is up to you.

I invite you to consider engaging Gregory Morris (Morris Estate Planning Attorneys), Scott Swain (McDonald Carano; ACTEC Fellow¹), Brendan Bybee (Stone Law Offices), or Michael Rasmussen (Hutchison & Steffen) to advise you. Greg Morris' contact information is provided below, and other attorneys' information will be provided upon request. If you wish to consider additional Nevada attorneys, please contact my office (office@rushforthfirm.com or 702-255-4552), and we can provide a list of additional attorneys for you to consider. If you live outside of the greater Las Vegas area, you may be able to find other attorney by searching the websites of ACTEC² or WealthCounsel.³

Unless a client specifically instructs otherwise, most of my files will be transitioned to Morris Estate Planning Attorneys, a trust-and-estate law firm that consists of Gregory Morris and his two sons, Taylor and Zachary, as well as several legal assistants. Morris Estate Planning Attorneys handle all aspects of estate planning, business planning, and non-litigation cases involving estates and trusts in probate court. Their office address is 3333 E. Serene Avenue, Suite 200, Henderson, NV 89074, and their phone number is 702-471-0990. To learn more about them, please take a look at their website, which is <https://www.probate-estatelaw.com/>.

Greg Morris' experience, his work ethic, and his work product are very similar to mine. I am quite familiar with Greg and his work. For over two decades, Greg and I have from time to time collaborated on a number of legal matters. Greg has worked on simple and very complex plans. Greg has high integrity, he is attentive to detail, he communicates in plain English with his clients, and his legal fees are very reasonable. Greg's sons are following in their father's footsteps. Greg's sons provide the element of continuity in the practice for years to come.

¹ ACTEC refers to the American College of Trust and Estate Counsel.

² You can search for an ACTEC Fellow at <https://www.actec.org>.

³ You can search for a member of WealthCounsel at <https://www.estateplanning.com>.

DOCUMENT DISPOSITION

I have a team working on retrieving file folders from our off-site storage facility, scanning original documents, making an inventory of the documents we have, and mailing those documents as clients direct. If we have no original documents, there is no physical file but only computer files containing scanned documents. Your “electronic file” will be sent via first-class mail in the form of a USB drive with scans of those documents in PDF format or by a download link using Citrix ShareFile, which is a service that provides online file sharing that is encrypted and secure. If you instruct us to do so and provide appropriate e-mail addresses, we can share the download link with anyone else you choose. If we have original documents⁴, those original documents and a USB drive, if you request it, will be sent to you – or, if you instruct us to do so, to your new attorney – by priority mail.

Please confirm your instructions regarding your file in writing by completing the attached instruction form. Please mark your choices and return it to our office by email sent to office@rushforthfirm.com, by mail to the address shown at the top of this letter, or by fax sent to 702-255-4677.

We have over 1,000 files to process, and it will take months before all physical files have been mailed or delivered. Electronic files can be expedited by sending a request to office@rushforthfirm.com that includes the email addresses of the persons who should have access to your document files.

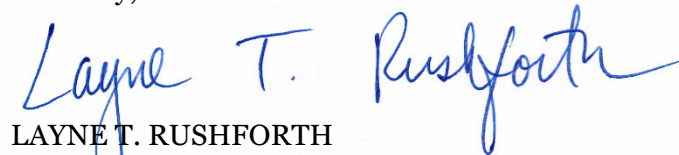
CONTACTING YOUR NEW ATTORNEY

The attorney to whom your documents are being sent will not contact you just because we provide that attorney your documents or access to those documents. If you need a consultation or if you need documents to be reviewed or prepared, you should contact the attorney’s office to schedule an appointment.

CONCLUSION

I want to thank you for allowing me to be involved in your legal work, and I want to wish you the best in all you do. I ask that you let us know where to send your file at your earliest convenience.

Sincerely,



LAYNE T. RUSHFORTH
Attorney at Law
layne@rushforthfirm.com

⁴ We never retained the only original of any document. An original document was kept in our files only if another original was signed at the same time.

INSTRUCTIONS TO RELEASE FILE

The undersigned hereby authorizes and instructs Rushforth Firm Ltd. to deliver any original documents to:

If you wish to receive an electronic copy of your documents, please indicate your choice below by checking one or more of the following:

I/we wish to receive a USB drive containing my original documents mailed to the address above. If you wish the USB drive to be mailed to a different address, please provide it below:

I/we wish to receive a secure link of my original documents for downloading. Send the link to the following email address(es):

Sign and date this authorization and return the form to Rushforth Firm Ltd:

Email: office@rushforthfirm.com*

Fax: 702-255-4677

Mail: Rushforth Firm, Ltd

5550 Painted Mirage Road, Ste. 320

Las Vegas, NV 89149-4584

(Signature)
Print Name:

Date

* If you do not have a scanner, you can “scan” this form using the Microsoft Lens or Adobe Scan app on your Android or Apple phone or tablet.

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