

**REQUEST FOR ESTATE PLANNING FILE**

I request CunninghamLegal to retrieve from storage all my estate planning documents that were prepared by \_\_\_\_\_.

Date: \_\_\_\_\_ Requestor Name: \_\_\_\_\_

Attorney who prepared documents: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Phone #: \_\_\_\_\_

\*Client/Trust Name(s): \_\_\_\_\_

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**AUTHORIZATION FOR RELEASE OR DESTRUCTION OF FILE**

It is the intention of CunninghamLegal to return your file. These contain all documents, in physical or digital form, of your estate plan acquired and stored by CunninghamLegal. Unless specified below, **you also give permission to CunninghamLegal to retain an electronic copy of this file**, if applicable, prior to release/destruction.

I, the undersigned, hereby request from CunninghamLegal, that **an electronic copy** of the file of the above mentioned\* be:

sent **to the email address listed above.**

forwarded **to a third party:**

Name(s): \_\_\_\_\_

Email(s): \_\_\_\_\_

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Client Name (Print)

Client Signature

Date