

*Legal Note:* The Documents here are provided for your information and that of your immediate family only. You are not permitted to copy any document provided to you. Each of these Documents provided are intended as general assistance in simple legal matters only. No document is intended to be used for any item, transaction, or other matter, where the total value of the item, transaction or matter is worth more than \$ 5,000.00. You are not authorized to use any document for any transaction which is in excess of \$ 5,000.00 in value or is not a simple matter. As a guideline to the meaning of simple, consider the following: if you can complete the document without any questions, it is likely a simple matter. However, if you need to ask any questions, you should consult with your Plan attorney. Do not speculate about completion of the blanks in this matter.

The information provided in the documents, and the instructions provided with each document are not intended to constitute legal advice. These documents are intended to assist consumers in protecting themselves in certain simple transactions, without incurring expensive attorneys fees. If you need legal advice, Plan Attorneys will be happy to provide a free legal consultation, at no cost, to you as a Plan member. Understand that if you contact a Plan Attorney, he/she may not advise you as to how to complete your documents. They may only be retained to prepare documents for you which they deem to be proper in your situation.

Certain documents can be completed with either a pen or a typewriter, unless indicated otherwise in the specific instructions. **You should not make changes or alterations to any documents, once you have completed the document.** You must complete a new document fully, even if you wish to make any changes, even a small change. If you make any changes to a document, you cannot be sure that the change conforms to legal requirements. For example, changes to a will, in some circumstances, may void the entire will, even if you intended to make the changes. Thus, it is a safer practice to make a new document, if you intend to make any changes.

If there are blanks which are not used or which contain no information, place an X, or a line through the blank. This ensures that no person can make unauthorized modifications to a document, by simply completing the blanks, and changing the entire crux of the document.

Certain documents may require a notary. Notaries are certified by each state, and can only operate in the states in which they are licensed to operate. An invalid notary may invalidate your document. Notaries serve the purpose of verifying that the signature of the person signing the document, is in fact, the person claiming to have signed the document. Certain institutions require a notary, even when state law does not. Be sure to check with the parties with whom you are dealing to see if they will require a notary. Banks often require notaries.

If you believe that you must record a document, you should consult with a Plan Attorney. No document provided here is intended for recording, and any such document must be prepared by a Plan Attorney. We have not included certain documents, despite repeated requests, because these documents require the skill and expertise of an attorney. These include trusts, deeds, Mortgages, Escrow Agreements and other documents. Always consult a Plan Attorney before drafting one of these documents on your own.

## **Instructions for Completing Receipt**

The following numbered instructions match the numbers under the blanks in the form:

- (1) Enter the date that the money or property is received.
- (2) Enter the address where the money or property is received.
- (3) Enter the full name(s) of the person(s), company(s), or organization(s) that received the money or property. If someone received the money or property for a company, organization, or other person, first list the name of the person who received the money or property, then list the name of the company, organization, or person on whose behalf the signer received the property.
- (4) Enter the address(es) of the person(s), company(s), or organization(s) that received the money or property. If someone received the money or property for a company, organization, or for another person, first list the address of the person who received the money or property, then list the address of the company, organization, or person on whose behalf the signer received the money or property.
- (5) Enter a full and accurate description of the money or property that was received. If money was received, type or print the amount of money in words and in numbers. Put the numbers in the parentheses. If property is received, put “none” in the parentheses. If property is received, include any title number, serial number, model number, make (such as Honda, Ford, Chevrolet, etc.), year of manufacture, or other information that will make it clear beyond any doubt what property is being referred to.
- (6) Enter the full name(s) of the person(s), company(s), or organization(s) that gave the money or property.
- (7) Enter the address(es) of the person(s), company(s), or organization(s) that gave the money or property.
- (8) If you want to describe the reason why the money or property is given, you should do so in this blank. A receipt should state, in this blank, the balance owed after the payment is made. If you do not want to describe the reason why the money or property is given, put “not applicable” in this blank.
- (9) Enter the date the money or property is received, which should be the same date that the receipt is signed by the receiver(s).
- (10) The receiver(s) should sign his, her, or their full name(s) here. If the receiver is receiving the money or property on behalf of a company or organization, the receiver should sign here and indicate that he or she is signing on behalf of a company or organization. For example, the president of a corporation would sign, “Acme Tools, Inc., by: John M. Jones, President”. As another example, an employee of a corporation would sign, “Acme Tools, Inc., by: John L. Williams, Shipping Clerk”.

After the receipt is signed, the person giving the money or property should keep the original receipt as proof that he or she gave the property or money to the receiver, and the receiver should keep a copy of the receipt for his or her records.

# Receipt

This written document acknowledges that on \_\_\_\_\_,  
(1)  
at \_\_\_\_\_,  
(2)

\_\_\_\_\_  
(3)

whose address(es) is/are \_\_\_\_\_  
(4)

received \_\_\_\_\_  
(5)

(\$ \_\_\_\_\_) from \_\_\_\_\_  
(5) (6)

whose address(es) is/are \_\_\_\_\_  
(7)

as \_\_\_\_\_  
(8)

Dated: \_\_\_\_\_  
(9)

\_\_\_\_\_  
(10)