



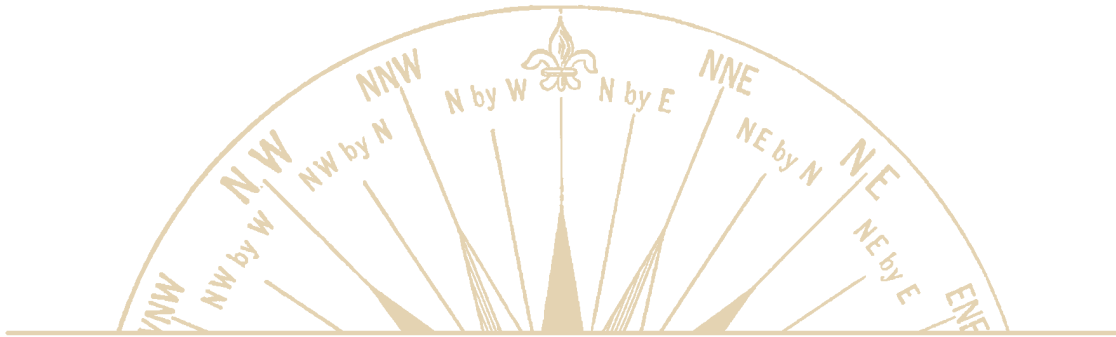
THE ENTERTAINERS CHECKLIST

ESTATE GUIDELINES AND CONSIDERATIONS



A VALUES BASED
RESOURCE JOURNAL
FOR ENTERTAINERS





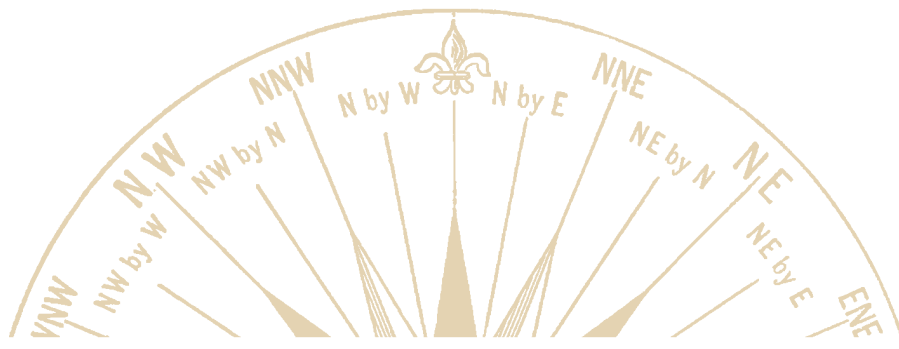
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Paul Bertrand Ellis, CIMA®
President and Managing Director

Paul Bertrand Ellis is an accomplished 25 year financial industry veteran. In addition to various investment and insurance licenses, he holds certification as a Certified Investment Management Analyst (CIMA®) through Investments & Wealth Institute and the Wharton School of the University of Pennsylvania.

In his practice, Paul provides a values-based approach focusing on high net worth wealth management. Professional service and open communication make Paul a personal advocate and passionate client portfolio director.

Paul is an active member of the Investments & Wealth Institute, and member of the Mukilteo Chamber of Commerce.

His volunteer activity has included serving as Co-Chair of the U.W Foster School of Business' Center for Entrepreneurship and Business Development, and Past-President of the Office of Minority Affairs Friends of the Educational Opportunity Program at the University of Washington.

Paul also participates in various local community projects and initiatives. As a graduate of the University of Washington, Paul strives to help students achieve their potential through learning and growth opportunities.

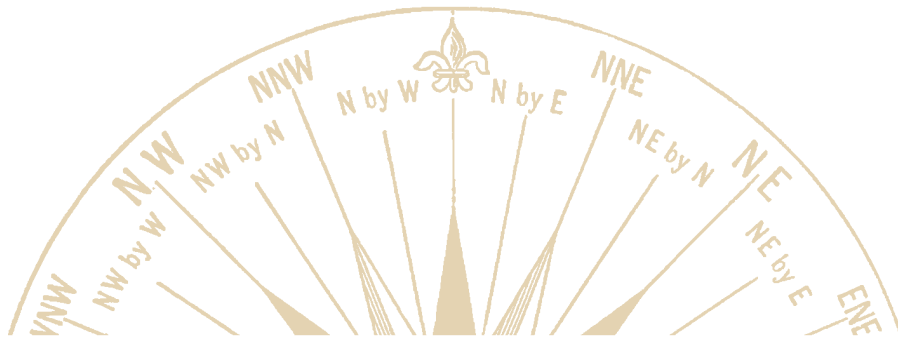
Seattle Magazine has consistently named Paul to The Best Wealth Managers List and he has been named among America's Most Honored Professionals by American Registry.

Paul hosts the EWM INSIGHTS podcast which can be found on Apple Podcasts, Amazon, Google, and Spotify podcasting networks.

America's Most Honored (2014 & 2015) is awarded from the American Registry. Once a year, the American Registry research department algorithmically scans a maintained database for professionals who have been awarded with the most American Registry authenticated recognitions. Qualified recognitions include significant press mentions, trade group honors, and peer recognitions. This award is not based on investment performance.

Ellis Wealth Management, LLC
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James A. Bergeron, J.D.

Advisor Education Consultant

Jim is an Advisor Education Consultant in the Global Learning and Development group where he and the team focus on developing and delivering intellectual capital designed to help wealth management firms and advisory practices evolve and enhance their relationships with clients.

Prior to joining Nuveen, Jim was the General Manager of Ameriprise Personal Trust Services. While at Ameriprise he used his experience in financial services, strategic and high net worth planning and product development to further enhance trust and wealth management results. Prior to Ameriprise Jim worked in advisory product development roles covering a diverse range of client financial solutions. Jim has lectured extensively and is an invited speaker at national and international conferences demonstrating techniques to actualize wealth management concepts.

Jim is a graduate of Augsburg University in Minneapolis with degrees in Economics and Political Science and later received his Law Degree from Vanderbilt University in Nashville, TN. Jim currently serves on the Northern Regional Council for the American Cancer Society.

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The Entertainers Checklist

3. Review and Inventory Intellectual Property and Royalties

- Copyrights: List all works (songs, compositions, performances, etc.) and their registration details.
- Royalties: Document how royalties are managed and distributed, including details on current contracts and revenue streams.
- Trademarks: Note any trademarks or brand names associated with your persona or work.

Thoughts:



The Entertainers Checklist

8. Review Legacy and Charitable Contributions

- Charitable Donations: Specify any charitable organizations you wish to benefit from your estate.
- Legacy Projects: Detail any ongoing projects or initiatives you want to be supported or continued.

Thoughts:



*Paul Bertrand Ellis, CIMA®
President and Managing Director*

*Ellis Wealth Management, LLC
"Invest in What You Love!"®*

Office: 425-405-7720

Cell: 425-263-0065

Text: 425-587-8810

www.elliswealthmanagement.net

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