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WHAT TO BRING WITH YOU TO THE ESTATE PLANNING CONSULTATION

Please Note: It would be helpful if you brought the following information and materials to your Estate Planning Consultation. Bring copies if that is more convenient for you. Thank you for your time and effort in this regard.

_____ **1.** Any estate planning documents that you have in place, such as wills, trusts, advance directives, living wills, powers of attorney, etc.

_____ **2.** Deeds or other title instruments evidencing your ownership or rights in real estate, including your home.

_____ **3.** Deeds or other title instruments evidencing your ownership or rights in oil, gas, or other mineral interests.

_____ **4.** Probate decrees where you inherited property; and Affidavits of surviving joint tenant if you are a surviving joint tenant in real property or mineral interests.

_____ **5.** Antenuptial (prenuptial) agreements.

_____ **6.** Personal income tax returns for the last year filed.

_____ **7.** List of the following information (but only if you do not complete our Estate Planning Worksheet or Questionnaire prior to the Consultation):

- **a.** Your legal name and social security number.
- **b.** Your birthdate and place of birth.
- **c.** Names and ages of your children, if any.
- **d.** Your residence address and phone number.
- **e.** Your assets and liabilities (or a good idea of your net worth), or current financial statement or balance sheet.

f. Persons you want to inherit from you or to be beneficiaries, including any charities.

g. Persons or entities you want to serve as your Trustee(s) if you are interested in a Trust.

h. Persons or entities you want to serve as the Personal Representative(s) of your Will.

i. Persons you want to serve as the Guardian(s) of your children if you have children who are minors.

j. Persons you want to appoint as your Agent(s) under Durable Powers of Attorney for property and health care.

k. Persons you want to appoint as your Health Care Proxy(ies) under an Advance Directive for Health Care.

l. Persons who serve as professional advisors to you, such as attorneys, accountants, financial advisors or planners, brokers, insurance agents, etc.).

m. Any family members you rely on for assistance with your legal planning and affairs.

_____ **8.** Optional documents (but only if requested by us prior to the Consultation):

a. Business papers and records -- *For example*, partnership agreements and record books, LLC operating agreements and record books, corporate minute books, buy/sell agreements, financial statements, business tax returns, etc.
b. Most recently-received statement for each account with a financial institution (such as a bank, credit union, etc.).
c. Most recently-received statement for each securities, brokerage, or investment account.
d. Employee or retiree benefit booklets and statements.
e. Gift tax returns.
f. Estate tax returns for the estates of persons from whom you received an inheritance or trust distribution.
g. Divorce decrees; and adoption papers.
h. Guardianship documents.
i. Life insurance and annuity policies or contracts.
j. Health insurance policies.
k. Admission agreements to nursing home and any other health care facilities.

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