



## **Estate Planning Items Needed for Initial Client Conference**

Please bring as many of the following items that you can to our first meeting. This will help us prepare a thorough and accurate estate plan.

1. Please bring copies of the following documents, if you have them. If you do not have a copier, bring the originals and we will copy them for you at our office during the initial consultation.
  - Wills
  - Trusts
  - Health Care Powers of Attorney and Living Wills
  - Financial or General Durable Powers of Attorney
  - Long Term Care Insurance Policies, if any
  
2. Please also bring the following financial information, if it applies to you.
  - Current bank statements (even if the account is a joint bank account)
  - Deeds for any real estate
  - Promissory Notes or mortgages for any loans you have made to others
  - Current brokerage statements
  - Current mutual fund statements
  - Copies of any Savings Bonds
  - Annuity contracts, recent annuity statements, and current beneficiary designations
  - Life insurance policies, recent statements, and current beneficiary designations
  - Qualified retirement account statements (such as an IRA, 401(k), 403(b)) and current beneficiary designations
  - Current statements for any debts (car loan, mortgage, etc.)
  - Current automobile titles
  - Cemetery deeds and prepared funeral expense information