WHAT TO BRING TO THE ELDER LAW CONSULTATION

The following documents will assist me in determining the appropriate legal advisement for your particular circumstances. Any advice given is only as good as the information on which it is based. The Principal Person refers to the person who has an elder law issue, i.e., in a nursing home, going into a nursing home, concerned about similar issues in the future. Our meeting will last 1.5 hours in duration and will cover details about family structure and dynamics, the principal person's personal net worth, and my office policies. Thank you for your cooperation. To aid our discussion, please bring the following documents to your appointment:

1. Your photo identification and identification for the Principal Person
2. Any previously executed estate documents for the Principal Person - Wills, Living Will, Trusts, Land Trusts, Powers of Attorney, Mental Health Declaration, DNR, HIPAA Disclosure
3. Information related to health or medical diagnoses of Principal Person
4. Copies of the deeds to all of homes, buildings, or lots the Principal Person owns
5. Most recent tax bill for any real estate
6. Life insurance policy statement
7. Most recent bank and brokerage account statements owned by Principal Person
8. Titles to vehicles owned by Principal Person (cars, boats, motorcycles, jet-skis, etc.)
9. A copy of the Principal Person's last year's tax return
10. Copies of any gift tax returns for the Principal Person
11. If Principal Person is widowed, copy of Form 706 for the predeceased spouse, if one was prepared
12. Copies of pre/post nuptial agreements for the Principal Person.
13. Copy of divorce decree(s) for the Principal Person.
14. Copy of adoption paperwork
15. A list of full legal names and addresses of Principal Person's next of kin
16. A list of personal items of high value (artwork, coins, stamps, antiques, jewelry, etc.) owned by Principal Person
17. Articles of Incorporation or Operating Agreements for business interests of Principal Person
18. Contracts for money owed to the Principal Person
19. Elder Law Intake forms from my office
20. Cash or check for consultation payment

It will be necessary for me to ask personal questions about assets and liabilities so that I can consider what issues may impact your circumstances. We will be able to proceed without any of the above documents but the advice given is only subject to the information provided. Thank you.