WHAT TO BRING TO YOUR ESTATE PLAN 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. Our meeting will last 1-1.5 hours in duration and will cover details about your family structure and dynamics, your personal net worth, your estate planning intentions and options, 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
2. Any previously executed wills, living will, trusts, land trusts, powers of attorney, mental health declaration, DNR, HIPAA disclosure
3. Copies of the deeds to all of your homes, buildings, or lots
4. Life insurance policy statement or beneficiary designation page
5. Most recent bank statements
6. A copy of last year's tax return
7. Copies of any gift tax returns
8. Copies of pre/post nuptial agreements
9. Copy of divorce decree(s)
10. Copy of adoption paperwork
11. A list of full legal names and addresses of your next of kin and intended beneficiaries;
12. A list of personal items of high value (artwork, coins, stamps, antiques, jewelry, etc.)
13. The Estate Planning Questionnaire from my office
14. If widowed, copy of Form 706 for your predeceased spouse, if available

It will be necessary for me to ask personal questions about your assets and liabilities so that I can consider what issues may impact your circumstances; for example, whether you are subject to federal or state estate taxes, gift or generation-skipping taxes, or ancillary administration proceedings.

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.