



ANDERSON ELDER LAW

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ITEMS NEEDED FOR INITIAL CLIENT CONFERENCE FOR LONG-TERM CARE PLANNING

Check the item for anything that applies to you.

1. Please bring copies of the following documents, **if you have them**. If you do not have a copy, bring the originals and we will copy them for you here.

- Wills
- Trusts
- Living Wills
- 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.

Married: If any account is a joint account titled with anyone other than your spouse, please bring copies of bank statements for the current and preceding year.

Single: If any account is a joint account, please bring copies of bank statements for the current and preceding year.

- Deeds for any real estate.
- Real estate tax bills (county, school and township).
- Notes or mortgages held by you, and amount of payment still due to you.
- Current brokerage statements.
- Current mutual fund statements.
- Copies of any Savings Bonds.
- Annuity contracts and recent annuity statements.
- Life insurance policies and recent statements, if available.
- Homeowners Insurance policy.
- IRA statements.
- Qualified retirement account (non-IRA) statements.
- Current statements for any debts (car loan, mortgage, etc).
- Current automobile titles.
- Documentation for any gifts made since February 8, 2006.
- Cemetery deeds and prepaid funeral expense information.

- Married Clients only:** list of estimated monthly expenses for monthly shelter expenses (on enclosed form).