ITEMS NEEDED FOR INITIAL CLIENT CONFERENCE:
ESTATE PLANNING

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.

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