

**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.