CHECKLIST OF DOCUMENTS TO BRING
TO ESTATE PLANNING CONFERENCE

For the initial conference, please bring with you the following documents if available (Note: These documents are not required, but the more information that is provided, the more precise our estate planning analysis can be):

1. Original or copies of Wills, Trusts, Power of Attorneys, and any other ancillary documents, if any;

2. Copies of deeds to real estate;

3. Copies of most recent bank statements for all checking accounts, savings accounts and certificates of deposit;

4. Copies of most recent brokerage/investment statements;

5. Copies of all life insurance policies;

6. Copies of all titles to cars, trucks and boats;

7. Copies of all accounts relative to any retirement benefits;

8. Copies of any premarital or postmarital agreement, if any;

9. Copies of any and all trusts wherein you are a beneficiary or grantor;

10. List of all furniture, furnishings and jewelry if consisting of substantial value;

11. Copy of last year’s tax return;

12. Copies of any gift tax returns (709), if any;

13. If divorced, copy of divorce decree.