WHAT TO TAKE TO YOUR 1ST ESTATE PLANNING MEETING

- ❑ A written list of your questions and concerns
- ❑ Take inventory – list your assets and debts
- ❑ Your up to date financial statements
- ❑ Your most recent bank, investment, & retirement account statements
- ❑ The deed to your house
- ❑ Any previous estate planning documents
- ❑ Any prenuptial or marital agreements
- ❑ Copies of your retirement plan and annuity contracts
- ❑ Life insurance policies
- ❑ Contact information for your other professional advisors
  - ❑ General practice attorney
  - ❑ CPA
  - ❑ Insurance professionals
  - ❑ Financial advisors
- ❑ Contact information for your general practitioner and any specialists that you see for a particular condition
- ❑ Contact information for family members, those you may name in positions of authority (such as trustees, guardians, executors, and agents under power of attorney), and clergy members
- ❑ Preliminary list of those you wish to name in positions of authority (such as trustees, guardians, executors, and agents under power of attorney)
- ❑ Preliminary list of your estate planning goals
- ❑ Contact information for your favorite charities

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