DOCUMENTS AND ITEMS TO BRING TO FIRST ESTATE PLANNING MEETING

For the initial conference it is helpful if you bring copies of the following items with you or provide them to our office prior to the initial meeting:

- Current will and trust, if you have one, and any other existing estate planning documents;
- Deeds and recent appraisals to any real estate or interests in real property;
- Most recent financial statements indicating whose name the accounts are titled in and beneficiary designations for all accounts including checking, savings, certificates of deposit, retirement and brokerage accounts;
- Any life insurance policies;
- Titles to all motor vehicles, motorcycles and boats;
- Any prenuptial agreement;
- If you own a business, copies of any partnership, buy-sell, shareholder or any agreements which may be in place;
- Any promissory notes or contracts if anyone owes you money;
- Recent tax returns;
- Any gift tax returns (Form 709);
- If divorced, copy of divorce decree.

STUDENBERG LAW

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