**DOCUMENTS TO BRING TO ESTATE PLANNING CONSULTATION**
**(Lawyer will review at meeting)**

## CALL IN INFORMATION IN ADVANCE

In addition to bringing the following documents with you to your appointment if possible, please also call in a day or two before your appointment, and let the attorney's staff know the address of any real estate in which the ill person or his or her spouse has any interest, so that the attorney can obtain copies of deeds before his meeting with you. [] Done

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## BRING IN WITH YOU IF POSSIBLE

____ Completed **ESTATE PLANNING INFORMATION FORM** (download from this website).

## OTHER DOCUMENTS THAT MAY BE HELPFUL

____ Health Care Advance Directive, Health Care Power of Attorney, or Living Will.

____ Power of Attorney.

____ Trust.

____ Will.

____ Deeds to real property.

____ Property tax statements.

____ Copies of savings bonds.

____ Life insurance policy, cash value statement, and beneficiary designation.

____ Annuity contracts.

____ Real estate contracts.

____ Copies of IRA and 401k statements, and beneficiary designations.

____ Documents re any loans or notes from or to any person or entity.

____ Documents relating to businesses, investments, limited liability corporations (LLCs), limited liability partnerships (LLPs), corporations or sub-chapter S corporations, and the like.