

**DOCUMENTS TO BRING TO GUARDIANSHIP AND OR CONSERVATORSHIP
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

BRING IN WITH YOU IF POSSIBLE

_____ Completed **GUARDIANSHIP/CONSERVATORSHIP INFORMATION FORM**
(download from this website).

OTHER DOCUMENTS TO BRING IN IF POSSIBLE

Please bring any of the following documents that you can locate to the first consultation.

- _____ Health Care Advance Directive, Health Care Power of Attorney, or Living Will.
- _____ Power of Attorney.
- _____ Trust.
- _____ Will.
- _____ List of assets owned by ill person *and/or* spouse.
- _____ Any documents received from, or filled out for, Senior Services, Medicaid, or similar offices.
- _____ Bank, insurance product, and brokerage statements.
- _____ Written evidence of actual pension income and actual Social Security income of ill person *and/or* of spouse (i.e. copies of annual statement for social security if available, copies of checks, copies of bank statements, etc.).
- _____ Nursing home or facility contract.
- _____ Health insurance policy (pamphlet, enrollment materials, retiree plan materials, etc.).

- _____ Deeds to real property.
- _____ Property tax statements.
- _____ Copies of savings bonds.
- _____ Life insurance policy, cash value statement, and beneficiary designation.
- _____ Copies of IRA and 401k statements, and beneficiary designations.
- _____ Annuity contracts.
- _____ Real estate contracts.
- _____ Documents re any loans or notes from or to person.
- _____ Any information available as to health condition, diagnosis, and prognosis of the ill or elderly person(s).
- _____ List or written outline of incidents during which the person put themselves in danger, put others in danger, or put their financial well being in danger.
- _____ List or written outline of future dangers that you perceive as likely risks, information about people who may harm the person or try take advantage of the person, and the like.