WHAT SHOULD I BRING TO THE NEXT MEETING?

It is helpful if you bring the following items to the next meeting or mail them to the law office prior to the next meeting:

- A copy of your current will(s), if you have one, and copies of any other existing estate planning documents, like trusts, Powers of Attorney, Living Wills, and Medical Powers of Attorney.

- Copies of any deeds to real estate, the most recent property tax statements for real estate, and any documents regarding real estate such as mortgages or anything else restricting use or transfer.

- If you own a business, copies of any partnership, buy-sell or corporate redemption agreements which may be in place.

- Copies of any promissory notes or contracts if you owe anyone money.

- Copies of the last three (3) years' Federal Income Tax Returns (if filed), and copies of any Federal Gift Tax Returns filed.

- A basic financial statement listing assets and liabilities and showing whose name assets are titled in and beneficiary designations. Alternatively, you may bring photocopies of up to date banking and brokerage account statements, and a list of (with valuations) U.S Savings Bonds, if you have these assets. List of all Life Insurance or Long-Term Care insurance policies, annuities, and health insurance coverage and cost information. For Life Insurance or Annuities, please try to find the current cash value and death benefit.

- If received, and you so desire, the completed Estate Planning Questionnaire/Long-Term Care Information Form, and Medical Supplement Information form, provided by our office.

Go to forms page on our website to download and print your documents.