ITEMS NEEDED FOR **ELDER LAW** CONSULTATION

Please bring the following items/information to your consultation:

- Copy of Will, Living Will, Financial and Health Powers of Attorney, Revocable or Irrevocable Trust Agreements (if any)
- Deeds to all real estate
- Current statement(s) from life insurance policies showing face value, death benefit, and cash surrender value
- Current statement(s) from all bank accounts, money market accounts, CDs, investment/brokerage accounts, and annuities
    - List of owners and beneficiaries (if any)
- Current statement(s) for all IRAs, 401(k) accounts, deferred compensation accounts, and any other retirement accounts
    - List of beneficiaries (if any)
- Current value of all stock (including number of shares)
- Current value of all savings bonds (including series and denomination)
- Itemized list of monthly income – Social Security, pension, annuity, salaries/wages, rent, and any other income
- Motor vehicle information – Make, model, year, mileage and condition
- Copy of long term care policy (if any)
- Monthly debts – mortgage, credit card, medical insurance premiums, medical expenses
- Children's names, (with middle initial), addresses and phone numbers
- Grandchildren's names (with middle initial)
- Names for any other people who may be a beneficiary of your estate or your agent under power of attorney

If your loved one is in a nursing home or personal care home, please **also** bring the following:

- Name of nursing home or personal care home
- Daily or monthly rate
- Date of admission to nursing home or personal care home