ITEMS NEEDED FOR **ESTATE PLANNING** CONSULTATION

- Current Will, Living Will, Financial and Health Powers of Attorney, Revocable or Irrevocable Trust documents (if any)
- List of assets – bank accounts, CDs, annuities, retirement accounts, life insurance policies, real estate
    - Please provide beneficiaries and/or joint owners' names
- Children's names (with middle initials), addresses and phone numbers
- Grandchildren's names (with middle initials)
- Names (with middle initials) for any other estate beneficiary
- Executor's name (with middle initial) and back-up Executor's name (with middle initial) (this is who will handle/administer your estate)
- Names (with middle initial) and addresses for all agents – Financial Power of Attorney and Health Power of Attorney. Include the name and address of the back-up agent(s).

If we may be preparing a Special Needs Trust for your loved one, please also bring a copy of the disabled individual's SSI/SSDI award letter or medical records referencing the person's condition/disability.