

## **Initial Estate Planning Meeting**

### What to Bring:

1. Completed Estate Planning Worksheet.
2. Deed to home (copy is sufficient).
3. Deed to any and all other real estate (copy is sufficient).
4. Names, addresses and phone numbers of children, heirs or any other individual you wish to name as a beneficiary, power of attorney, executor, guardian, trustee or trust advisor.
5. Automobile certificates of title (memorandum or copy is sufficient).
6. Insurance and/or annuity policies, along with beneficiary designations.
7. Most recently filed federal income tax return.
8. Statement of personal net worth (if available).
9. Inventory list of assets: ownership, value/balance, name of institution, account number, beneficiary designations and cost basis.
10. Estate planning documents currently in effect: Wills, Powers of Attorney, Trust Agreements and/or Living Wills.