

## **What to bring to your first meeting with your estate planning attorney**

You can save time and money by bringing a few documents to your first meeting with an estate-planning attorney. None of these documents are essential during the first meeting, but bringing them could save time and avoid misunderstandings.

The following list is intended only to refresh your memory about documents which you may wish to bring to the meeting. If you cannot locate some of these documents, please do not cancel or reschedule your appointment; your attorney will let you know which documents to provide after your first meeting.

- ◆ Copies of your current or prior wills or trusts (if any).
- ◆ A financial statement or summary, such as:
  - ❖ Copy of your most recent loan application
  - ❖ Copies of current bank and investment-account statements
  - ❖ Printout from computerized finance program
- ◆ Copies of your deeds to your house or other real property (It's important for your attorney to know if ownership is "joint tenancy" or "community property" (or otherwise), and who shares ownership).
- ◆ Retirement Benefits (Summary of the current value of each retirement account, including IRA, SEP, Keough, and 401(k)).
- ◆ Employee Benefits (Any booklet or summary of your benefits [including retirement benefits and/or life insurance] provided by your employer).
- ◆ Life Insurance Information (Copy of your policy, current billing statement, or application; and copy of your beneficiary designation).
- ◆ If you own stock in a "closely-held" corporation (such as a family business), copies of your share certificates and/or any agreement regarding the business (such as a "shareholders' agreement," "repurchase agreement," or "buy-sell agreement").
- ◆ If you are the beneficiary of any trust, a copy of the trust document and any financial statement or summary you have from the trust.
- ◆ An outline of your "family tree" showing your parents, your siblings, and your children and grandchildren.