Documents Needed For Your First Meeting

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Please bring the following items to our initial meeting, if they are available:

1. Completed Client Information Sheet _____
2. Personal Information including marital status, family information, including children and grandchildren. _____
3. A list of your professional advisors _____
4. A detailed list of assets and liabilities _____
5. Banking and financial account statements _____
6. Choice of guardian(s) for minor children (name and addresses) _____
7. Choice of executors, trustees and other personal representatives _____
8. Copies of current wills or trusts _____
9. Copies of deeds to all real property _____
10. Homeowner's Declaration Pages of Homeowner's Insurance Policies _____
11. Copies of life insurance policies _____
12. Copies of prior gift tax returns, if any _____
13. Copies of trust agreements in which husband and/or wife are a donor or beneficiary _____
14. If you applied for public benefits such as Medicaid or Social Security, you should bring copies of documents having to do with the applications. _____

In many estate planning matters, a child visits the lawyer to seek help for his or her parent. The lawyer will clearly want to understand your relationship, why you are seeking help for the person, and why the person is unable to seek the lawyer's help personally. You should be prepared to bring with you the documents that "prove" your authority to perform the transactions you want to do.

Gathering the above documents should not stop you from making your appointment. This is just a guideline to get you started and to save you time.

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