Prepare for Your Estate Planning Consultation

What to gather before meeting with an estate planning attorney

> You don't need perfect numbers or every document in hand. A simple list and your best estimates are enough to help make your first conversation more productive.

1 · YOUR FAMILY & KEY PEOPLE

☐ Full legal names, birthdates and contact information for you and your spouse/partner.

☐ Names and birthdates of children and other people or charities you may want to provide for.

☐ Any special circumstances to discuss: minor children, disabilities or special needs, prior marriages, financial support obligations, or beneficiaries who may need added protection.

☐ Names of people you may trust to serve as guardian, successor trustee/executor, financial agent, and health care agent.

2 · YOUR EXISTING ESTATE PLAN

☐ Current will(s) and trust(s), including amendments or restatements.

☐ Financial and health care powers of attorney, living will or other advance directives.

☐ Beneficiary designations or other estate-planning documents you would like reviewed.

☐ Prenuptial/postnuptial agreements, divorce/property settlement documents, or prior gift/estate tax returns, if applicable.

3 · YOUR GOALS & QUESTIONS

☐ What matters most to you: avoiding probate, planning for incapacity, protecting loved ones, reducing conflict, charitable giving, tax planning, long-term care concerns, or other priorities.

☐ Questions or concerns you want to be sure we discuss.

4 · A SNAPSHOT OF WHAT YOU OWN

☐ Real estate: home, rentals, vacation property, land or timeshares - with approximate value and loan balance.

☐ Bank accounts: checking, savings, CDs and money market accounts.

☐ Investments: brokerage accounts, stocks and bonds.

☐ Retirement accounts: IRAs, 401(k)s, 403(b)s, pensions and similar plans.

☐ Life insurance and annuities - including current beneficiary information if available.

☐ Business interests: LLCs, partnerships, corporations or other ownership interests.

☐ Vehicles, boats, RVs and valuable personal property or collections.

☐ Other significant assets, money owed to you, expected inheritances or other unusual property.

5 · HELPFUL FINANCIAL DETAILS

☐ Approximate current values are fine - statements can be helpful but are not required for every account.

☐ How major assets and accounts are currently titled or owned, if known.

☐ Names of your accountant, financial advisor and insurance professionals, if applicable.

☐ Information about long-term care insurance or government benefits, if relevant.

BRING WHAT YOU HAVE. WE CAN HELP IDENTIFY WHAT COMES NEXT.

This checklist is a preparation tool, not a substitute for the full questionnaire your attorney may ask you to complete.