

Preparing to Meet With Your Estate Planning Attorney

As you get ready for your first meeting with an estate planning lawyer, you should plan to bring certain documents and information with you. This information will help your attorney develop an estate plan suitable to your specific situation and goals. This list is only meant to be a guide, and there may be additional information your attorney will request.

Financial Information (including account names, numbers, balances and current statements)

- Bank accounts
- Investment accounts (annuities, mutual funds)
- Stocks
- Bonds
- U.S. Treasury notes

Retirement Savings Information (including balances, beneficiaries, outstanding loans and current statements)

- 401(k) accounts
- 403(b) accounts
- IRAs
- Life insurance policies
- Social Security statement
- Pension

Property Information (including property description, address, ownership interest, market value, outstanding mortgage balance and most recent tax assessment)

- Primary residence
- Rental properties
- Vacation homes
- Business property
- Personal property of value (antiques, collectables, automobiles, jewelry, art)
- Inheritance (current or anticipated)
- Interest in trust (current or future)

Business Information (including interest in the business, location)

- Closely-held business
- Family business
- Limited partnership

Family Information (including names, ages, addresses)

- Spouse
- Ex-spouse
- Children
- Stepchildren
- Grandchildren

Other things to consider

- Who would you like to receive your property?
- Is there anyone you would not want to receive your property?
- Do you want to leave anything to a charity, university, church or other organization?
- Who would you like to serve as executor of your will?
- Who would you like to serve as trustee over any trusts?
- Would you like to appoint a guardian to care for any minor children?
- Do you want to create a living will and a durable health care power of attorney?
- Do you want to assign other powers of attorney, such as for your finances?
- Do you want to leave instructions for your funeral arrangements?
- Do you want to donate your organs or donate your body to science?
- Who would you like to serve as alternate executor, trustee, guardian or power of attorney if your first choice is unavailable or unable to fulfill the duties?

Finally, consider your overall goals and desires for your estate plan. This will help guide your estate planning attorney in developing a comprehensive plan tailored to meet your individual needs.