ESTATE PLANNING CONSULTATION CHECKLIST

In order to provide you with the most comprehensive consultation, please bring copies of these documents to leave with me at the consultation.

Drivers License/Passport	Annuity Statements
Social Security Card	Most recent bank statements
Personal Tax Returns for previous 2 years statement	Life Insurance Policy/cash value and beneficiary(ies)
Wills, Health Care Proxies and Living Wills if already executed	Brokerage Account Statements
Name, address and telephone number of financial advisor and accountant	Stock Certificate(s)
Deed/Coop/Condo Information	Mortgage Papers (payment book)
Home Owner's Insurance Policy	Real Estate Tax Bill
Corporation Information	Any other documents that you would like to discuss

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