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 (All Accounts)
Personal Tax Returns for previous 2 years statement	Life Insurance Policy/cash value and beneficiary(ies)
Wills, Trusts, Powers of Attorney, 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: Shareholder, LLC and Partnership Agreements	Pre-nuptial Agreement, or any other agreements that may affect distribution of your estate and/or any other documents that you would like to discuss

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