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CHECKLIST OF ITEMS TO BRING WITH TO INITIAL ESTATE PLANNING MEETING

If any of these materials are not available at the time of our first meeting, the information can be provided as we move forward. We usually will scan the information requested and return the originals back to you immediately or shortly after our first meeting.

1. ___________ Title policy or legal description for your personal residence and any other real estate.

2. ___________ Most recent statement for each investment cash, savings or investment (brokerage) account.

3. __________ Copy of every life insurance policy or annuity (including the most recent statement, if possible) showing ownership and beneficiary designation

4. ____________ Most recent statement for each retirement plan or IRA account (or pension plan).

5. ___________ Copy of most recent personal income tax return

In addition, if the following apply, please bring

6. ___________ Copy of marital settlement agreement for divorce (if there are remaining child support, maintenance, college or insurance obligations).

7. ___________ Copy of pre-marital ("ante-nuptial") agreement

8. ___________ Copy of any business agreements (shareholder agreements, "buy sell" agreements, employment and/or noncompetition or deferred compensation agreements).

9. ___________ If husband/wife own any interest in a business, please bring the last three years' income tax returns for the business entity

10. ____________ Copies of any promissory notes or significant indebtedness