THE ELDER LAW FIRM Davis Pagnano McNeil & Vigna, LLP

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INFORMATION TO BRING TO THE FIRST ESTATE PLANNING MEETING

Please bring photocopies or originals of the following documents with you to your appointment. Most people do not have all of the documents listed below. Please bring the ones that you have.

☐ Current will or trust, including any codicils or amendments

☐ Financial powers of attorney, including any naming you as the agent

☐ Advance directive for health care, power of attorney for health care, Living Will, and POLST

☐ Any trust naming you as a beneficiary or giving you a power of appointment

☐ Deeds to real property in which you own an interest, with most recent property tax statements

☐ Promissory notes, mortgages, deeds of trust, and real estate contracts

☐ Titles for cars, trucks, recreational vehicles, and boats

☐ Most recent statements or current printouts for checking, savings, and money market accounts; certificates of deposit (CDs); mutual funds and brokerage accounts; Treasury Direct accounts; and IRA, Keogh, 401K, and other retirement plans or accounts (including beneficiary designations)

☐ Printouts showing ownership and value of digital assets

☐ Stock certificates, bonds, and U.S. savings bonds

☐ Life insurance policies and annuity contracts (including beneficiary designations)

☐ Ownership documents for oil, gas, and mineral rights and royalties

☐ Ownership documents for limited partnerships and other business interests

☐ Most recent statements showing balances owing on loans, credit card accounts, and debts

☐ Court orders for divorce, separation, support, and adoption or parentage, and prenuptial agreements

☐ Names and addresses of children, grandchildren, other people or organizations whom you plan to name in your will or trust