What to Bring Your First Appointment

FINANCIAL PLANNING/ELDER LAW

The following information is necessary in assisting you to develop an estate plan by preparing Wills, Trusts, and other legal documents:

1. Name, address and phone number of possible Attorney-in-fact and Alternate, Executor, and Trustee;

2. Name, address, and phone number of possible Health Care Proxy Agent and Alternate Health Care Proxy Agents;

3. List of all the assets you own, the name or names on the title of each asset, and, if there is a named beneficiary transferable to upon death, then the name of the beneficiary;

4. Identity of beneficiaries and amount or percentage of your estate that you want to give to them upon your death;

5. For planning to avoid depleting your estate by long-term nursing home expenses, bring your previous 2 years' income tax returns showing your expected income, a list of assets as set forth in Paragraph 3 above and an estimate of monthly income and monthly expenses.