INFORMATION NEEDED
FOR
ESTATE PLANNING

The following is a list of items which you should bring with you to your appointment. They will be helpful in assessing your estate planning goals and needs, and in many cases, will be necessary to carry out the plan.

1. Completed Personal and Financial Information for Estate Planning Questionnaire.

2. Copies of deeds to any real estate owned, including your residence. Complete addresses to the properties, assessors' parcel numbers, their approximate current values, the original purchase price and dates of purchase (Per Questionnaire Section II).

3. Copies of any stock certificates, bonds or other securities owned. If the securities are held in a brokerage account, bring a copy of your most recent statement (Per Questionnaire Sections III and IV).

4. Copies of any account summary statements for any IRA / 401(k) or other retirement plan assets. If the assets are held in a brokerage account bring a copy of your most recent statement. Also bring the current beneficiary designation for each account or plan (Per Questionnaire Section V).

5. Copies of the face sheet for any life insurance policies owned. Also provide the name and address of the agent and / or home office of the company (Per Questionnaire Section VI).

6. Copies of pertinent documents for any other investments, such as documents regarding partnerships, businesses owned as a sole proprietor, time shares, oil and mineral rights, etc. (Per Section Questionnaire Section VII).

7. Copies of the most recent statements on any bank or credit union accounts (Per Questionnaire Section VIII).

<u>For more information</u>:

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