Estate Planning and Elder Law Consultation Check List

Please bring as many of the following documents as possibly with you to our first meeting. If you need to bring original documents, we can make copies of these documents and retain the copies for our file. You may always update information as you receive new documents. And please ask any questions you may have about the requests.

1. Your social security card and health insurance cards *(Elder Law Only)*
2. Copies of Life Insurance Policies including statements verifying cash and face values *(Elder Law Only)*
3. Copies of any real estate deeds *(Elder Law Only)*
4. Copy of most recent property tax bills and mortgage statements *(Elder Law Only)*
5. Copies of any trusts, wills, powers of attorney or health care powers of attorney
6. Copies of current statements (for example, bank account, brokerage, stocks, bonds, IRA, and annuity statements)
7. Verification of monthly income from pensions, social security, annuities, retirement funds, verifying gross and net monthly income *(Elder Law Only)*
8. Value of automobile(s) and other vehicle(s); copy of title(s) *(Elder Law Only)*
9. Copy of burial/funeral arrangements including the Plot Deed and Irrevocable Funeral Trust *(Elder Law Only)*
10. A complete list of transfers or gifts made over the last 60 months including date of transfer and amount of transfer *(Elder Law Only)*