

Items to Bring to the First Meeting

- 9 Current estate plan documents: Wills, trust agreements, financial powers of attorney, health care powers of attorney, property agreements.
- 9 For each item of property you own, bring in the *grant deed* or *quitclaim deed* (don't bring in deeds of trust on properties you own), together with your last tax bill from the County Assessor.
- 9 If anyone owes you money, bring in a copy of the promissory note. For secured notes *payable to you*, also bring in a copy of the recorded trust deed.
- 9 Life insurance policies, together with current statements if the policies have accumulated cash value.
- 9 Policies and most recent statements for deferred annuities, tax-sheltered annuities and IRA's with a life insurance company.
- 9 Current statements for mutual funds and securities accounts.
- 9 Current statements for 401(k) accounts, pension plans, profit sharing plans and IRA's or other tax-qualified plans with banks, mutual funds and brokerage firms. For IRA's and other qualified plans, we need to determine whom you have designated as the primary and contingent beneficiary. This is found on the initial application for the account. If you cannot locate that document, contact the plan administrator to request a copy.
- 9 Policies for long-term nursing care insurance.
- 9 Most Recent federal income tax return, together with gift tax returns, if any.
- 9 If you've completed the enclosed questionnaire, bank statements are not necessary. Otherwise, please bring in your most current statements from banks, credit unions and other depositories.