THE LAW OFFICE OF
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What to bring to an estate planning meeting

- ☐ The most recent statement from:
  - Bank Account(s) - checking, savings
  - Certificate(s) of Deposit (CD)
  - Credit Union(s)
  - Pension
  - 401(k)
  - Investment Account(s)
- ☐ Stock/Bond Certificates or Statements
- ☐ Life Insurance Policies
- ☐ Safe Deposit Box Contents
- ☐ Family Information
  - Family Tree: starting with your grandparents all the way down to your grandchildren; include dates of birth, marriage and death if known.
  - Any divorce or custody decree
- ☐ Real Estate
  - Deed to property, wherever situated
- ☐ Beneficiary Statements
- ☐ Current Estate Plan documents

Not all clients have every type of document listed. Please bring what you do have.

It is better to have too much information, rather than not enough so please bring a document even if you are not sure whether it is important. If you have any questions before our meeting please call me at 773-481-6648.