

Jordan Balkema Elder Law Center

ESTATE PLANNING

WHAT SHOULD I BRING TO MY FIRST APPOINTMENT?

It is helpful if you bring the following items to the initial meeting:

1. Please bring the Estate Planning Checklist.
2. A basic financial statement listing assets and liabilities and showing whose name assets are titled in and beneficiary designations.
3. A copy of your current will(s), if you have one, and copies of any other existing estate planning documents.
4. Copies of any deeds to real estate, the most recent property tax statements for real estate, and any documents regarding real estate which may restrict use or transfer.
5. Copies of promissory notes or contracts if anyone owes you money.
6. If you own a business, copies of any partnership, buy-sell or corporation redemption agreements which may be in place.
7. Any prior pre-nuptial or post-nuptial agreements.
8. Any other information which you think might be pertinent.

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