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:

- ✔ A basic financial statement listing assets and liabilities and showing whose name assets are titled in and beneficiary designations.
- ✔ A copy of your current will or trust, if you have one and copies of any other existing estate planning documents.
- ✔ 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.
- ✔ Copies of promissory notes or contracts if anyone owes you money.
- ✔ If you own a business, copies of any partnership, buy-sell or corporation redemption agreements which may be in place.
- ✔ Any prior pre-nuptial or post-nuptial agreements.
- ✔ Any other information which you think might be pertinent.

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