

**DOCUMENTS TO BRING TO INTERVIEW**

- ♦ Completed Estate Planning Questionnaire
- ♦ Current Will
- ♦ Current Trust (created by you or by others for your benefit)
- ♦ Current Powers of Attorney and Living Wills
- ♦ Personal Income Tax Returns (last year only)
- ♦ Business Tax Returns (last year only)
- ♦ Life / Health / Disability / Umbrella Insurance Policies
- ♦ Brokerage Statements and Stock Certificates
- ♦ Savings, Checking and Money Market Statements
- ♦ Employee Benefit Plan Descriptions (Pension, Profit Sharing, Group Insurance, etc.) and Beneficiary Designation Forms
- ♦ Business Buy-Sell Agreements and Employment Contracts
- ♦ Pre-Nuptial or Post-Nuptial Agreements and Divorce Decrees / Property Settlements
- ♦ Gift Tax Returns
- ♦ Homeowner's Insurance Policy and Personal Property Riders
- ♦ Deed(s) to Real Estate
- ♦ Other Documents: \_\_\_\_\_  
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