



CHECKLIST OF ITEMS FOR INITIAL CONSULTATION

Check the box for anything that applies to you.

1. Please bring copies of the following documents **if you have them**. If you do not have a copier, bring the originals and we will copy them for you..

- Wills
- Trusts
- Living Wills
- Powers of Attorney
- Long-Term Care Insurance Policies

2. Please also bring the following financial information **if it applies to you**.

- Deeds to real estate.
- Notes or mortgages receivable by you.
- Brokerage statements.
- Series E or EE bonds.
- Annuity contracts and annuity statements.
- Life insurance policies.