

PLEASE PLAN TO BRING THE FOLLOWING DOCUMENTS¹ WITH YOU TO OUR CONFERENCE:

1. Existing Will or Wills, and Trusts, if any
2. Any gift tax returns that you have filed
3. Buy-Sell or Stock Redemption Agreements
4. Stock and Bank account statements
5. Income tax returns for the past two years
6. “Pre” or “Post” nuptial agreements
7. Deeds to real estate
8. Information concerning retirement benefits, pension, profit-sharing, or stock bonus plans
9. Prior divorce decree or separation agreements
10. Existing Powers of Attorney which you have granted
11. Outstanding contracts or Promissory Notes owed to you
12. Documents related to any sole proprietorship, partnership or corporation in which you have an interest
13. Any other documents, papers, or information which you would like the attorney to review with you.

¹Copies of the preceding documents will be sufficient.