DOCUMENT CHECKLIST

Please use the following list as a guide to carefully gather the necessary information for your consultation:

- [ ] Copies of recent bank statements and stock statements,
- [ ] Retirement plan balance statements
- [ ] Copies of all deeds to real property
- [ ] Copies of any real estate tax statements for each parcel of real property
- [ ] Copies of any Promissory notes & trust deeds for money owed TO you
- [ ] Any wills and trusts previously prepared on your behalf
- [ ] Any pre or post marital agreements
- [ ] Previously filed estate or gift tax returns
- [ ] Copies of declaration pages of life insurance policies
- [ ] Copies of declaration pages for your property insurance
- [ ] Copies of declaration pages for your title insurance
- [ ] Copies of retirement plans or the plan summary
- [ ] Copies of custodial/trust agreements for IRA accounts
- [ ] Copies of any annuity contracts
- [ ] Previous 2 years income tax returns
- [ ] Copies regarding any other asset you own