

Things to Bring to First Meeting

IMPORTANT LEGAL PAPERS

- Decree of Dissolution (if applicable).
- Pre-nuptial or post-nuptial agreement.
- Copy of any will or trust agreement currently in force.
- Copy of any state or federal gift tax return previously filed.
- Copy of any trust under which client is a beneficiary or holds any power of appointment.
- Copy of any living will, health care power of attorney, or general power of attorney currently in force.

IMPORTANT FINANCIAL PAPERS

- Deed and tax statements on all real estate or real estate interests (i.e. oil, gas, mineral, or water rights).
- Deeds for cemetery lots.
- Copy of your brokerage account statements (mutual funds, stocks, bonds, etc.).
- Copy of all stock certificates.
- Copy of your work-related retirement plan summary plan document.
- Copy of any life insurance policies and periodic statements.
- Copy of any annuity policy documents and periodic statements.

Don't Forget Your Personal Calendar!