

Documents To Bring to The Meeting.

Please endeavor to bring copies of all existing estate and related planning documents to your meeting. If feasible please provide an electronic copy as well.

- Powers of Attorney.
- Living Wills/Health Care Proxies/HIPAA Releases.
- Wills.
- Revocable Living Trusts.
- Letters of Instruction.
- Family data, balance sheet and other background information not listed in the pages above.
- Life insurance policies.
- Umbrella, Long Term, and Disability insurance policies.
- Copies of any fully executed trust agreement (insurance trust, child/children's trusts, GST/grandchildren trusts, defective grantor trusts and other trusts).
- Entity records and kits for any corporations, LLCs or other entities. Partnership, operating, shareholder and buy-out agreements for any entity if not in the kit.
- All beneficiary designation forms.
- Documents indicating any lawsuit, claim or other debt.
- Brokerage statements. A recent statement for every significant financial account and every account for any trust.
- Prenuptial, Post-Nuptial, Divorce and similar agreements.
- Deeds for every property.
- Prior gift and estate tax returns. It is critical that we have a copy of any gift tax or estate tax return that reported the creation of any irrevocable trust, that confirm your exemption (including any portable exemption from a deceased spouse).
- Any other relevant documents.

Your Signatures.

Sign below indicating the accuracy and completeness of this Questionnaire, and that you have read and understood any planning or other comments noted by your advisers. Your advisers' work will be based on this information. You must inform all of your advisers of any changes that may be important to your planning. You must be certain to follow up on all items your advisers have indicated to you that you must address.

Your Signature

Partner's/Spouse's Signature

