

Helpful Documents to Bring:

1. Copies of existing estate planning documents.
2. Copies of your latest bank statements, brokerage statements, etc. with respect to all assets that will be a part of your Estate Plan.
3. Copies of deeds with respect to all of your real estate.
4. Names, addresses and phone numbers of individuals who will be serving as your Successor Trustee, Guardians for your minor children and Executor of your Estate.
5. Names, addresses, phone numbers and birth dates of your children.
6. Life Insurance Statements - including death benefit, cash surrender value, and premium amount if available.