

Items Needed for Initial Consultation

Existing Documentation:

- Last Will
- General Durable Power of Attorney
- Healthcare Power of Attorney
- Living Will
- Trust

Asset Documentation:

- Deed(s) to Property
- Real Estate Tax Bill
- Home Owner's Insurance Bill
- Life Insurance Policy Information
- Annuity Statements

- Banking Statements including:
 - Checking
 - Saving
 - CDs
 - Money Market
 - IRA

- Financial Investment Statements
- U.S. Savings Bonds
- Yearly statement from Social Security

Personal Information:

- Client Personal Photo ID or State Driver's License
- Social Security Card
- Birth Certificate
- Marriage Certificate
- Medicare Card
- Health Insurance Card