✅ Estate Planning Meeting Preparation Checklist/Guide

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To ensure a productive and efficient meeting, please review the checklist below and bring any relevant information with you. Not all items may apply to your situation.

👤 Personal & Family Information

- Full legal names and birthdates (you, your spouse/partner, and any children or dependents)
- Contact info (address, phone, email)
- Information for individuals you may name in your estate plan:
  - Executor/Personal Representative
  - Trustee and successors
  - Guardian(s) for minor children
  - Durable Power of Attorney
  - Health Care Surrogate

💼 Financial & Asset Summary

Gather account summaries, recent statements, or a written list for the following:

- Bank and savings accounts
- Investment or brokerage accounts
- Retirement accounts (IRA, 401(k), etc.)
- Real estate (addresses, value, mortgage balance)
- Life insurance policies (amounts and beneficiaries)
- Business ownership interests or LLCs
- Vehicles, boats, or titled assets
- Valuable personal property (art, jewelry, collectibles)
- Digital assets (e.g., cryptocurrency, online investment platforms)
- Safe deposit box details

🧾 Debts & Liabilities

- Mortgages
- Auto or personal loans
- Credit card balances
- Any other significant liabilities

📄 Existing Legal Documents (If Any)

- Wills or Trusts
- Powers of Attorney
- Health Care Directives or Living Wills
- Pre- or Post-Nuptial Agreements
- Property deeds or title documents
- Business operating agreements
- Any other estate planning documents

🎯 Your Goals & Preferences

Spend a few moments thinking about:

- Who you want to inherit your assets
- Whether you want to avoid probate
- Who should make decisions for you if you’re incapacitated
- Preferences for long-term care, medical decisions, or end-of-life care
- Any charitable or legacy intentions
- How you'd like minor or special needs beneficiaries provided for

Once you decide to move forward with your plan, we’ll guide you through next steps and give you access to your secure client portal to share documents and finalize details.

We look forward to helping you plan with clarity and confidence.

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