ANDERSON ELDER LAW

LINDA M. ANDERSON, J.D., LL.M., CERTIFIED ELDER LAW ATTORNEY

ITEMS NEEDED FOR INITIAL CLIENT CONFERENCE FOR ESTATE PLANNING

Check the item for anything that applies to you.

1. Please bring copies of the following documents, **if you have them**. If you do not have a copier, bring the originals and we will copy them for you here.

__ Wills
__ Trusts
__ Living Wills
__ Powers of Attorney
__ Long Term Care Insurance Policies

2. Please also bring the following financial information, **if it applies to you**.

__ Current bank statements.
__ Deeds for any real estate.
__ Notes or mortgages receivable by you.
__ Current brokerage statements.
__ Current mutual fund statements.
__ Copies of any Savings Bonds.
__ Annuity contracts, and annuity statements.
__ Life insurance policies and recent statements, if available.
__ IRA statements.
__ Qualified retirement account (non-IRA) statements.
__ Current statements for any debts (car loan, mortgage, etc.)

08-08

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