



# ANDERSON ELDER LAW

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206 Old State Rd, Media, PA 19063 T: 610-566-4700 F: 610-566-4702

## ITEMS NEEDED FOR INITIAL CLIENT CONFERENCE FOR ESTATE PLANNING

Please bring as many of the following documents with you on our first meeting. This will help us prepare a thorough and accurate estate plan.

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, if any.
  
2. Please also bring the following financial information, **if it applies to you**.
  - Current bank statements.
  - Deeds for any real estate.
  - Notes or mortgages held by you, and amount of payment still due to you.
  - Current brokerage statements.
  - Current mutual fund statements.
  - Copies of any Savings Bonds.
  - Annuity contracts and recent 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.)
  - Current automobile titles.
  - Cemetery deeds and prepared funeral expense information.