



ITEMS NEEDED FOR INITIAL CLIENT CONFERENCE: LONG-TERM CARE PLANNING

Please bring as many of the following items that you can to our first meeting. This will help us prepare a thorough and accurate 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 at our office during the initial consultation.

- Wills
- Trusts
- Health Care Powers of Attorney and Living Wills
- Financial or General Durable 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 (even if the account is a joint bank account)
- Deeds for any real estate.
- Promissory Notes or mortgages for any loans you have made to others.
- Current brokerage statements.
- Current mutual fund statements.
- Copies of any Savings Bonds.
- Annuity contracts, recent statements, and current beneficiary designations.
- Life insurance policies, recent statements, and current beneficiaries.
- Qualified retirement account statements (such as a IRA, 401(k), 403(b)), and current beneficiaries.
- Current statements for any of your debts (car loan, mortgage, etc).
- Current automobile titles.
- Cemetery deeds and prepaid funeral expense information.
- Documentation for any gifts made during past 60 months.
- Homeowners' Insurance policy and most recent premium payment.

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- Married Clients only:** List of estimated monthly expenses for monthly shelter costs (real estate taxes, homeowners insurance, and utilities).