

WHAT TO BRING TO YOUR ESTATE PLANNING CONFERENCE
(In addition to the completed questionnaire)

1. Copies of any trust in which you are a beneficiary or trustee.
2. Copies of originals of grant deeds or title policies (not trust deeds) for real properties.
3. Copy of the last real property tax bill for all parcels of real property.
4. Copies of bank statements and stock brokerage statements.
5. Copies of stock and bond certificates.
6. Copies of life insurance policies and latest statements.
7. Details of assets received by gift or inheritance or owned prior to present marriage.
8. Details and copies of gift tax returns filed.
9. Copies of any trusts established by you or your spouse.
10. Copies of any agreements regarding the ownership of your respective assets.
11. Copy of your most recent federal income tax return.
12. Copies of present wills.