

What You Need to Bring For Your First Appointment

Estates:

1. Original Last Will and Testament, or at least a copy, as well as a copy of any Trust
2. Certified copies of Death Certificate
3. If spouse is deceased - name, date and place of death
4. Name and Mailing Address of spouse, children, and children of any predeceased child of the decedent and, if there is no spouse, children or grandchildren, then the name and address of all brothers and sisters of the decedent who were alive on decedent's date of death and the children of any predeceased brothers and sisters. If any such heir or beneficiary is under 18 years of age, include date of birth, name of parents who the minor resides with, and whether there is a Court Appointed Guardian
5. List of Assets: **(a)** Name of Bank (including Branch), Name on Account, Account Number, and approximate balance in account; **(b)** Original life insurance policy or name of company, Policy Number, and name of beneficiary; **(c)** If stock, name of broker, account number and latest monthly statement; **(d)** Savings Bonds - bring original bonds or list of bonds, including date of bond, face value of bond, Serial Number and names on bonds; **(e)** Deed and current tax receipts to all real estate owned; **(f)** Certificate of Title to any registered vehicle (car, boat, motorcycle, truck, camper, all-terrain vehicle, etc.); **(g)** Retirement Benefit information (Retirement Number and who to contact); **(h)** if Veteran, VA number; and **(I)** description of any other asset that contains decedent's name, either alone or jointly with another
6. Copy of Funeral Bill
7. Any other information you think may be helpful

Financial Planning/Elder Law:

The following information is necessary in assisting you to develop an estate plan by preparing Wills, Trusts, and other legal documents:

1. Name, address and phone number of possible Attorney-in-fact and Alternate, Executor, and Trustee.
2. Name, address, and phone number of possible Health Care Proxy Agent and Alternate Health Care Proxy Agents.
3. List of all the assets you own, the name or names on the title of each asset, and the approximate fair market value of such asset.

4. Identity of beneficiaries and amount or percentage of your estate that you want to give to them upon your death.

5. For planning to avoid depleting your estate by long term nursing home expenses, bring your previous two years' income tax returns showing your expected income, a list of assets as set forth in Paragraph 3 above, and an estimate of monthly income and monthly expenses.

Real Estate:

1. Original Deed;
2. Tax Bills/Receipts for the current year which may include the following:
 - a. School Tax
 - b. Town & County Tax
 - c. Village Tax
 - d. Water & Sewer Rent;
3. Abstract of Title or current Title Insurance Policy;
4. Any maps, including any survey maps;
5. Contract of Purchase and Sale, if one was already prepared;
6. Any other papers that may relate to the property you are selling.

Litigation:

If You Have Been Sued:

1. Copy of any legal papers served or mailed to you along with the exact date you or someone else was served the papers.
2. Supporting documents to support your claim or defense.
3. Identity and location of witnesses.
4. History of events in chronological order.

If You Have Been Injured:

1. Copy of any injury or Accident Report prepared by Police or anyone else.
2. Copy of any hospital and medical records detailing injury, treatment, and prognosis for recovery.

3. Photographs of accident scene and injury.
4. History of events in chronological order.
5. Identity and location of witnesses.
6. Notes as to admissions and relevant statements made by the person causing your injury.

Business Entities:

1. Exact Trade Name of Entity
2. Any existing Corporate Records
3. Name, Address, Telephone No., Social Security No. of key owner/employees of business
4. Previous year's Income Tax Return of Business

Family Law:

1. Birth Certificate, Death Certificate, Marriage Certificate, Court Order or any previous Court Order
2. Any other documents which you believe may be pertinent to the particular matter.

If a Marital Dissolution:

1. List of assets
2. Approximate value of assets
3. Names shown on title of such asset
4. Previous Income Tax Return showing income of the parties involved.

Vehicle and Traffic:

1. Copy of the traffic ticket
2. Copy of Driver's License
3. Abstract of Driving Record (available from DMV)
4. Name, address, and phone number of witnesses.