ITEMS TO BRING TO THE FIRST MEETING

1. Completed Estate Planning Questionnaire
2. California Driver's License (clear and legible, preferably color scanned)
3. Federal Income Tax Return (last 2 years)
4. Grant Deed, Tax Bill and Most Recent Mortgage Statement for your Home
5. Grant Deed, Tax Bill and Most Recent Mortgage Statement for Other Real Estate
6. Bank Account and Credit Union Statements
7. Brokerage Firm and Mutual Fund Company Statements, including IRAs
8. Employee Retirement Account Statements [401(k), SEP, pension, profit-sharing, etc.]
9. Life Insurance Policies and Annuity Contracts
10. Promissory Notes and Trust Deeds (for money loaned by you to others)
11. Name/Address/Phone of Guardians for Children - 1st Choice, 2nd Choice, 3rd Choice
12. Trusts, Wills, Powers of Attorney and Health Directives
13. Prenuptial or Postnuptial Marital Agreements
14. Corporate, Partnership and LLC Formation Documents
15. Name/Address/Phone of Primary Care Physician
16. Name/Address/Phone of Financial Advisor
17. Name/Address/Phone of CPA
18. Name/Address/Phone of other Legal Counsel
19. List of Autos and Watercraft (Own? Lease?)
20. List of Personal Contents of Home Exceeding $10,000 of Fair Market Value
21. List of Prior Gifts Exceeding $12,000 to any one Person in any one Calendar Year