

WHAT TO TAKE

to your first

ESTATE PLANNING MEETING



IN PREPARATION FOR
YOUR FIRST ESTATE
PLANNING MEETING,
BE SURE TO GATHER
THESE IMPORTANT
DOCUMENTS.

FOR MORE
INFORMATION,
PLEASE CONTACT:

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BAY MEDICAL FOUNDATION

- ☐ Your most up to date financial statements including bank, investment, and retirement account statements
- ☐ List of all liabilities including mortgages, lines of credit, and other debt
- ☐ The deed to your house and/or other real estate you currently own
- ☐ Copies of any leases, land contracts or notes payable to you
- ☐ Titles to vehicles and boats
- ☐ Any previous estate planning documents
- ☐ Any prenuptial or marital agreements
- ☐ Copies of your retirement, pension plan(s), or annuity contracts
- ☐ Life insurance policies, including beneficiary designations
- ☐ Information regarding any business interests you hold
- ☐ Contact information for your other professional advisors, including:
 - Attorney
 - CPA
 - Insurance professionals
 - Financial advisors
- ☐ Contact information for family members and those you may name in positions of authority (such as potential trustees, guardians, executors, patient advocates and agents under power of attorney) or as beneficiaries
- ☐ Contact information for your favorite charities
- ☐ A written list of your questions, concerns, and estate planning goals