STUDENBERG LAW

Ganon J. Studenberg, J.D., LL.M., AEP®
Master of Laws in Estate Planning, Accredited Estate Planner, AV Rated

**DOCUMENTS AND ITEMS TO BRING
TO FIRST ESTATE PLANNING MEETING**

For the initial estate planning conference it is helpful if you bring copies of the following items with you or provide them to our office prior to the initial meeting:

- Current will and trust, if you have one, and any other existing estate planning documents;
- Deeds and recent appraisals to any real estate or interests in real property;
- Most recent financial statements indicating whose name the accounts are titled in and beneficiary designations for all accounts including checking, savings, certificates of deposit, retirement and brokerage accounts;
- Any life insurance policies;
- Titles to all motor vehicles, motorcycles and boats;
- Any prenuptial or marital agreements;
- If you own a business, copies of any partnership, buy-sell, shareholder or any agreements which may be in place;
- Any promissory notes or contracts if anyone owes you money;
- Recent tax returns;
- Any gift tax returns (Form 709); and
- If divorced, copy of divorce decree.

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