

MATERIALS FOR ESTATE PLANNING MEETINGS

- 1. COPIES OF PRESENT ESTATE PLANNING DOCUMENTS, INCLUDING LAST WILLS AND TESTAMENTS, TRUSTS, POWERS OF ATTORNEY**
- 2. COPIES OF THE PRESENT OWNERSHIP IN REAL ESTATE, INCLUDING DEEDS, TAX STATEMENTS, AND REAL ESTATE CONTRACTS**
- 3. LAST TWO YEARS' INCOME TAX RETURNS**
- 4. A FINANCIAL STATEMENT INDICATING APPROXIMATE VALUES FOR ESTATE AND THE CASH VALUE AND DEATH VALUE FOR LIFE INSURANCE POLICIES.**
- 5. A LISTING OF THE FULL NAMES, ADDRESSES, AND DATES OF BIRTH OF FAMILY MEMBERS, INCLUDING PARENTS, SIBLINGS, CHILDREN, AND/OR GRANDCHILDREN**

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