

In order for us to have an effective estate planning meeting, you should bring copies of the following:

- Existing trust(s) or will
- Powers of appointment (POA's)
- Health directive/living will
- Personal financial statement
- Current asset statements
- Last 3 years of federal tax returns
- Anything else I see as pertinent to my legacy

You should also spend a little time thinking about the following:

- Who are my likely beneficiaries?
- Are there any special familial situations I need to address? (i.e. special needs grandchild or spendthrift?)
- Do I have concerns about how my assets will be used?
- Are there any charities that I should/would like to help?
- Other unique concerns (family farm, business succession, unique assets)
- What do I want my legacy to be?