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ESTATE PLANNING DOCUMENTS TO BRING WITH YOU TO YOUR CONSULTATION

PRIOR LEGAL DOCUMENTS: Power of Attorney, Will, Living Will, Health Care Directive

DEED: To any/all properties owned

LIST OF ALL RESOURCES: Bank accounts, stocks, bonds, CD's, money markets, IRA's, Christmas/vacation clubs, etc.

- a. Ownership
- b. Approximate current value
- c. Beneficiaries

LIFE INSURANCE: Policies, face value, death benefit, cash surrender value

LIST OF ALL INCOME: Social Security, pension, civil service annuity, interest income, etc., by month

GIFTED MONEY: Date gifted and amount gifted exceeding \$500.00 in any month