CHECKLIST FOR OUR FIRST MEETING

Please have copies of the following items available for our initial meeting. Note that this is a broad list and some items might not apply to your personal situation.

CASH, SAVINGS & INVESTMENTS

- Checking & savings account balances
- Trust account statements
- Mutual Fund, CD, bond and stock account statements
- Real estate values and ownership (joint, trust)
- College savings statements for accounts you own on behalf of your grandchildren

RETIREMENT PLANS

- Recent statements for IRAs, Roth IRAs and former 401K plans
- Pension plan or state retirement plan monthly income (with survivor benefits to spouse?)
- Inherited IRAs (please provide original owner's date of birth and date of death)
- Current gifting strategies you are implementing for your children and/or grandchildren

OTHER ITEMS

- Current Social Security Income
- Income you receive from part-time work or real estate investments
- Life insurance policies (beneficiary and owner)
- Long Term Care insurance policies (monthly benefit, waiting period, company)

QUESTIONS TO CONSIDER

- What does the concept of "legacy" mean to you?
- Do your estate planning documents reflect your current wishes and desires?
- How much money does it take monthly to maintain your current lifestyle after taxes?
- Are there any charitable organizations you want us to consider in your planning?
- What kind of impact do you imagine leaving behind when you are no longer here?
- Are there any special needs or considerations that you or any family members have?
- What do you worry about?
- What are you most looking forward to?
- What, if anything, feels incomplete to you at this stage in life?

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