



## Items to Gather Prior to Meeting with Estate/Financial Planning Professional

Make a list of all assets, including:

- Bank accounts (checking, savings, CDs, etc.)
- Location of safe deposit boxes and contents (also list who is on the signature card for access to box)
- Vehicles
- Retirement accounts, IRAs
- Investment accounts
- Real estate (i.e. home, land, etc.)

For each of the assets you own, please include current value, names on the accounts, who can sign on the accounts, individual listed as owners for vehicles and real estate, and beneficiaries (if stated) on all accounts.

Make a list of all debts, including:

- Mortgage payments
- Loan payments (i.e. vehicles, boats, student loans, etc.)
- Credit card payments
- Insurance payments (i.e. home, auto, insurance, health insurance, life insurance, etc.)
- Child support and/or alimony payments

For each of the debts listed, please include current balances, monthly payment amount, and which debts are set up as an automatic deduction from bank account.

Additional items to bring to your meeting (if applicable):

- Copies of all estate planning documents. This includes Last Will and Testament, trusts, power of attorney, health care power of attorney
- Copies of all deeds to real estate
- Copies of past three (3) years of tax returns
- Life insurance policies. Please list cash value and the names of beneficiaries
- Health insurance policies or benefits booklet
- Admission agreements to health care facilities (if your loved one is in a rehabilitation, assisted living, retirement, memory care, or nursing home community)
- Pre-paid funeral or cremation policy



List the name, address, phone number, email address, and relationship for the following individuals that are involved in your life:

- Family (spouse/partner, son, daughter, mother, father, etc.)
- Care partners
- Financial planners
- Accountants
- Lawyers
- Anyone else that you depend upon/have a close relationship with on a regular basis

Additional items to discuss with estate/financial planning professional:

- Options for healthcare and long-term care
- Options for managing personal care and property
- Medical coverage with health insurance, Medicare, Medicaid, Veterans Administration benefits and other long-term care insurance