

Preparation For Your Will
(No Trust Provisions)

In order to make our first meeting more productive, it may help if you consider the following:

YOUR INTENDED BENEFICIARIES

- Create a “family tree,” listing your living relatives. Include grandparents, parents, siblings, children, and grandchildren. It would be helpful to have addresses where your relatives are currently living. Include their maiden names and their married names, if applicable.
- Bring a list of any friends or charities you may wish to remember in your will.

WHAT YOU OWN

- Take an inventory of the property you own. Include:
 - Your primary residence
 - Any vacation home you may have
 - Vehicles (cars, trucks, boats)
 - Bank accounts. Include your account numbers and approximate values
 - Stocks, bonds, mutual funds, and any other investments
 - Safe deposit box information
 - Life insurance policies
 - List of personal property, such as jewelry, coin collections, etc.

HOW YOU OWN IT

- Determine the manner in which you own the assets listed above. You may own the property individually, or co-own with a spouse or with another individual.

IF YOU HAVE MINOR CHILDREN

- Consider who you would like to care for your children if something should happen to you.

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WHAT ELSE SHOULD YOU BRING?

- Bring a photo identification
- Any prior will you may have
- Any other estate planning information you have