

# R. ZEBULON LAW, ESQ.

A PROFESSIONAL LAW CORPORATION

ATTORNEYS  
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## LIST OF ITEMS TO BRING TO INITIAL ESTATE PLANNING MEETING

Please consider bringing the following documents with you to the initial meeting. Our firm's policy is to scan the documents and return any originals back to you immediately or shortly after our initial consultation.

Your significant estate planning documents include the following:

- Wills
- Trusts
- Powers of Attorney
- Advance Health Care Directives
- A copy of the deed(s) to your primary residence and any other real property in your name(s)
- Life insurance policies or annuities including ownership and beneficiary designations
- Any business agreements or other documentation relating to businesses (i.e. Articles of Incorporation)
- Any promissory notes or other significant indebtedness, including deeds of trust
- Prenuptial Agreement
- Divorce decrees or marital settlement agreements
- Other cash, savings, and investment account statements or information
- Retirement plans (i.e. 401(k) or IRA information)
- Income Tax Return (most recent)
- Most recent gift tax return (if any)

Providing the above information will help us ensure that we advise you properly and that your estate planning objectives are accomplished in the most effective and efficient manner. We appreciate the opportunity to meet with you.