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Your One-Stop Resource for Long Term Care Planning!

ITEMS TO BRING WITH YOU OR TO HAVE KNOWLEDGE ABOUT FOR THE INITIAL LEGAL DOCUMENTS CONSULTATION APPOINTMENT

The initial consultation is an opportunity for you to provide us with enough information so that we can evaluate your potential need for legal document preparation and estate planning.

You do not have to bring any documents with you to the appointment; however, having the following information with you OR accessible to you may help streamline the appointment saving you time and money. We look forward to meeting with you.

NOTE: If married, please provide information for both spouses.

This consultation is billed at \$120.00 per hour. Legal document preparation fees are billed separately. However, if you choose an estate planning portfolio (EPP), the fees paid at this consultation are credited to the EPP fee.

1.	Demographic information (name, date of birth, place of birth, marital status, former marital relationships, current address, phone numbers)
2.	Children and grandchildren information (name, date of birth, special needs issues)
3.	Information about legal documents you already have (POA, medical POA, mental health care POA, living will, trusts (owner or beneficiary), Wills, agreements, child support, QDROs, etc.). Please bring these ones with you to the appointment.
4.	Assets (type of asset, value of assets, debt on assets) (example: financial accounts, investments, retirement accounts, annuities, life insurance, burial insurance, burial plans, businesses, property, vehicles, etc.)
5.	Income (type of income, amount received, how often received) (example: Social Security, government pensions, retirement pensions, annuities, rental income, earned income, etc.)
6.	Former employment
7.	Expenses (types, amounts paid, frequency of payments) (example: rent, utilities, debt, donations, medical expenses, etc.)
8.	Medical insurance coverage (carrier, premium amount, premium frequency)
9.	Military service (dates of service, whether or not service was during wartime, honorable discharge)

