

# Information Needed for the Legal Documents Data Collection Appointment

This appointment is to gather the data for the document preparation. Some information you can collect in advance and send in advance. Other information will be asked during the appointment to clarify your specific directions/information for your document preparation.

NOTE: If we are preparing documents for both spouses that are married, please provide information for both spouses.

**It is important to name people to handle your affairs (financial, medical, mental health, death, etc.) that have similar beliefs as you and who will honor your wishes.**

1.	<p><b>For financial power of attorney documents:</b></p> <ul style="list-style-type: none"> <li>• Agent, his/her full address, and phone number</li> <li>• Back-up or successor agent(s), his/her full address(es) and phone number(s)</li> <li>• Effective immediately or only upon incapacity</li> <li>• Gifting and/or planning powers</li> </ul>
2.	<p><b>For medical or health care power of attorney documents:</b></p> <ul style="list-style-type: none"> <li>• Agent, his/her full address, and phone number</li> <li>• Back-up or successor agent(s), his/her full address(es) and phone number(s)</li> <li>• Autopsy and organ donation options</li> <li>• Separate HIPAA waiver?               <ul style="list-style-type: none"> <li>○ If yes, extra fee due &amp; who else to add to document.</li> </ul> </li> </ul>
3.	<p><b>For mental health power of attorney documents:</b></p> <ul style="list-style-type: none"> <li>• Agent, his/her full address, and phone number</li> <li>• Back-up or successor agent(s), his/her full address(es) and phone number(s)</li> </ul>
4.	<p><b>For living will documents; decisions about ...</b></p> <ul style="list-style-type: none"> <li>• Keep alive at all costs</li> <li>• Do you want CPR, electric shock to restart heart, or artificial breathing?</li> <li>• Do you want artificially administered foods &amp; fluids?</li> <li>• If pregnant, keep alive to allow to develop to point of live birth?</li> <li>• Separate Oral Feeding for Dementia patients form (hand-feeding or no hand-feeding)               <ul style="list-style-type: none"> <li>○ If yes, extra fee due and decision about hand-feeding needed.</li> </ul> </li> </ul>
5.	<p><b>For Last Will &amp; Testament and/or Codicil to Will documents:</b></p> <ul style="list-style-type: none"> <li>• Personal Representative(s), his/her full address(es) and phone number(s)</li> <li>• Back-up Personal Representative(s), his/her full address(es) and phone number(s)</li> <li>• Beneficiaries (specific bequests, remainder of estate), and back-up beneficiaries</li> </ul>

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	<ul style="list-style-type: none"> <li>List of assets (who owns, type of asset, company, value)</li> <li>Specific bequests you want to incorporate into Will</li> </ul>
6.	<p><b>For Trust documents:</b></p> <ul style="list-style-type: none"> <li>Initial Trustee(s), his/her full address(es) and phone number(s)</li> <li>Successor trustee(s), his/her full address(es) and phone number(s)</li> <li>Beneficiaries (specific bequests, remainder of estate), and back-up beneficiaries</li> <li>List of assets (who owns, type of asset, company, value)</li> <li>If we will be preparing letters to change ownership or beneficiaries on your assets, please provide each company's legal name and full address and each asset's reference or account number OR bring all pages of the asset's ownership document or most recent statement with information and values.</li> <li>Property deed(s) <ul style="list-style-type: none"> <li>Multiple properties? If yes, extra fee for each property added to trust.</li> </ul> </li> <li>Vehicle title(s)</li> </ul>
7.	<p><b>For Final Disposition Instructions:</b></p> <ul style="list-style-type: none"> <li>Do you want to be buried or cremated?</li> <li>Representative(s) to manage final disposition (name(s), address(es), phone number(s))</li> <li>Back-up Representative(s) to manage final disposition (name(s), address(es), phone number(s))</li> </ul>
8.	<p><b>For deed or beneficiary deed documents:</b></p> <ul style="list-style-type: none"> <li>Property address and Full legal description of property</li> <li>Grantor: Owner(s) of property (names and addresses)</li> <li>Death certificates (original) for any deceased owners</li> <li>Grantee: To whom property is being transferred (names and addresses)</li> <li>How Grantee is taking title (if applicable)</li> </ul>
9.	<p><b>For Small Estate Probate:</b></p> <ul style="list-style-type: none"> <li>Decedent's Original Last Will &amp; Testament (all pages)</li> <li>If Decedent did not complete a Will, Decedent's list of heirs' names and addresses (spouse, biological/adopted children, grandchildren, parents, siblings)</li> <li>List of assets (who owns, type of asset, company, value)</li> <li>List of income (due to Decedent)</li> <li>List of Decedent's debts (who owed, company, amount)</li> </ul>

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