Reset Checkboxes

Please bring these documents to the first meeting for each client:

Identification Documents (Check all applicable boxes and bring related documents):

☐ Driver's license ☐ Social Security card ☐ Health insurance card ☐ Medicare card

☐ Marriage license or certificate ☐ Divorce decree ☐ Wartime military service & discharge records

Real Estate Documents: (Check all applicable boxes and bring related documents):

☐ Deeds showing your name as a sole owner or co-owner of real estate in any state or country (including your home, business, farmland, rental properties, condos, timeshares, and cemetery plots)

☐ Deeds for any property that you used to own but do not own now, including splits of existing tracts

☐ Most recent property tax statement or assessment notice for each of your real estate tracts

☐ Real Estate rental agreements ☐ Farm lease agreements ☐ Real estate mortgage loan documents

Income Documents: (Check all applicable boxes and bring related documents):

☐ Work pay stub ☐ Pension statement/notice

☐ Social Security statement (Not SSA-1099) ☐ Any other income information

Account Documents: (Check all applicable boxes and bring related documents):

☐ Most recent bank account statements ☐ Most recent investment account statements

☐ Most recent retirement account statements ☐ Copies of certificates of deposit

☐ Copies of savings bonds ☐ Copies of stock certificates

Other Important Information: (Check all applicable boxes and bring related documents):

☐ Life insurance policies and related documents ☐ Annuity policies & related documents

☐ Safety deposit box (bank lock box) information & contents list ☐ Vehicle titles

☐ Business records regarding any corporation, partnership, limited partnership, LLC, or sole proprietorship

Tax Information: (Check all applicable boxes and bring related documents):

☐ Most recent income tax return ☐ Any filed gift tax returns filed

Previous Planning: (Check all applicable boxes and bring related documents):

☐ Existing estate plan documents (will, trust, power of attorney, etc.)

☐ Any recent financial statement provided to a lender

☐ Prepaid funeral services and all related documents (including life insurance assigned to the funeral home)

Gifts, Sales, and Loans: (Check all applicable boxes and bring related documents):

☐ Information about church tithing ☐ Information about contributions to charitable organizations

☐ Documents and Information about gifts to family members or other people

☐ Documents and information about loans to family members or others

☐ Documents and information about sales of land or business assets to family members or others

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