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WHAT TO BRING TO AN OFFICE CONFERENCE FOR ESTATE AND LONG TERM CARE PLANNING

Clients often inquire what to bring to an initial office conference for estate planning and/or long term care (nursing home) planning. The following is a list of items to bring with you to make the appointment time with legal counsel more efficient:

ESTATE PLANNING CONFERENCE:

1. COMPLETED CLIENT INFORMATION SHEET/QUESTIONNAIRE
2. EXISTING ESTATE PLANNING DOCUMENTS (WILL, TRUST, POWERS OF ATTORNEY HEALTH CARE AND FINANCE, LIVING WILL)
3. NAMES, ADDRESSES AND PHONE NUMBERS OF ANY PERSONS WHO ARE CHOICES TO BE POWERS OF ATTORNEY FOR HEALTH CARE DOCUMENTS
4. HOMESTEAD WARRANTY DEED OR TITLE INSURANCE POLICY CONTAINING THE FULL LEGAL DESCRIPTION FOR THE PROPERTY
5. HOMESTEAD TAX BILL
6. VACANT OR VACATION HOME/LAND LEGAL DESCRIPTION AND TAX BILL
7. YOUR DATE OF BIRTH AND LAST FOUR DIGITS OF YOUR SOCIAL SECURITY NUMBER
8. NAMES, ADDRESSES, AND PHONE NUMBERS FOR YOUR CHILDREN (OR INDIVIDUALS YOU WISH TO DESIGNATE AS YOUR AGENTS)
9. IF DIVORCED, DATE OF PRIOR DIVORCE AND NAME OF FORMER SPOUSE
10. DATE OF CURRENT MARRIAGE (only for Marital Property Agreements/Prenuptials)

MEDICAL ASSISTANCE CONFERENCE:

1. EXISTING ESTATE PLANNING DOCUMENTS
2. INCOME (SOCIAL SECURITY, PENSION, INVESTMENTS, ETC.)
3. ASSETS (LOCATION AND AMOUNTS AND TYPES)
4. DEED TO HOUSE AND PROPERTY TAX BILL
5. DEED TO VACATION PROPERTY AND TAX BILL, IF ANY
6. GIFTS MADE IF ANY (AMOUNTS AND DATES)
7. LIFE INSURANCE/ANNUITY CONTRACTS/POLICIES
8. RETIREMENT ACCOUNTS
9. MEDICAL ASSISTANCE APPLICATION IF THE PROCESS HAS ALREADY BEEN STARTED

REV 11-9-18