DOCUMENTS REQUESTED BY FARRELL & JOHNSON PLLC

Please bring all relevant documents to the initial conference for both spouses:

	DOCUMENT:	BROUGHT TO OFFICE or DATES NEEDED
1	Proof of age & identity w/ photo (driver's license, Texas i.d. card or U.S. Passport)	
2	Medicare & other health insurance cards, policies, recent statement showing premiums and who is covered	
3	Employee or retiree benefit booklets and statement; Military service records	
4	Marital property agreements, divorce decrees, adoption papers	
5	Long term care insurance policies & recent statement of status	
6	All vehicles (make, model, year, miles) incl. boats, trailers, RV, motorcycles, etc.	
7	Real estate deeds & appraisals (property tax, other appraisals you have) for all land, houses, condominiums and oil & mineral interests (whether or not leased or producing); history of any income from all real property including mineral rights	
8	Prepaid funeral contracts and burial insurance policies, deeds or other documents showing ownership of burial spaces	
9	All bank, debit card, credit union, savings, money market, CD & brokerage account, mutual funds and other securities (stocks/bonds) statements for the last 3 months; for securities not held in accounts, provide copies of stock certificates, bonds, promissory notes, etc.	
10	A current balance of any patient trust fund at a care facility/nursing home	
11	Expected refund of significant size or undeposited checks payable to you	
12	For any bank or brokerage accounts closed in the last 5 years, statement showing the financial institution, account number, closing balance and date closed	
13	Life insurance and annuity policies (entire policies & current statements)	
14	Business interests, property, entities including partnership agreements, other contracts, income tax statements, other indications of value, liquidity and buy-sell arrangements	
15	Sources and amounts of regular & irregular income: Social Security benefits statement; pay or pension stubs showing gross pay and amounts withheld; 1099s and income tax return for most recent year	
16	Documents pertaining to any assets worth more than $200 that you have given away (or sold for less than fair market value) in the last five years, showing asset description, value of asset, amount (if any) received, and to whom transferred. Examples: deeds, bank statements showing transfers.	
17	Gift tax returns if any	
18	Wills, codicils, trust instruments and conveyance instruments into trust	
19	Directive to physicians, medical power of attorney, DNR if any, Decl of Guardian;	
20	Financial (statutory/general or limited/durable) power of attorney	
21	If guardianship: Letters and order appointing guardian	
22	If not otherwise provided to this office, a list of full *names, addresses, emails and telephone numbers* of people who have a part in your planning as executors, trustees, beneficiaries of your estate, power of attorney agents, helpers, and advisors; identify anyone you specifically instruct us not to communicate with.	