FARRELL & JOHNSON PLLC

DOCUMENTS NEEDED FOR ESTATE PLANNING

Please provide this office all the following *that apply to you*. You may provide copies or originals. If you provide originals, they will be copied and the originals returned to you.

1. Wills, codicils, trust agreements
2. Real estate deeds & appraisals (including most recent property tax appraisals) for all land, houses, condominiums and oil & mineral interests
3. Income tax returns for the last year
4. Life insurance and annuity policies (or summaries of benefits) and beneficiary designations
5. Most recent statements of account for savings & checking accounts
6. Most recent statements from mutual funds, brokers and other investment advisers; or for securities not held in accounts, provide copies of stock certificates, bonds, promissory notes, etc.
7. Divorce decrees, prenuptial agreements, adoption papers
8. Guardianship documents
9. Living wills (directives to physicians), health care declarations (medical powers of attorney), durable powers of attorney
10. Employee or retiree benefit booklets and recent statements
11. Business papers: for example, partnership agreements, corporate minute books, buy/sell agreements, financial statements, business tax returns
12. If not otherwise provided to this office, a list of full names, addresses, and telephone numbers of people who have a part in your planning as executors, trustees, beneficiaries of your estate, helpers, and advisors. (If you prefer, you may bring your address book with this information to the conference.)