

**Jordan Balkema Elder Law Center, PLLC**

**ESTATE PLANNING**

**WHAT SHOULD I BRING TO MY FIRST APPOINTMENT?**

It is helpful if you bring the following items to the initial meeting:

- Y Please bring the Jordan Law Office Estate Planning Checklist.
- Y A basic financial statement listing assets and liabilities and showing whose name assets are titled in and beneficiary designations.
- Y A copy of your current will(s), if you have one, and copies of any other existing estate planning documents.
- Y Copies of any deeds to real estate, the most recent property tax statements for real estate, and any documents regarding real estate which may restrict use or transfer.
- Y Copies of promissory notes or contracts if anyone owes you money.
- Y If you own a business, copies of any partnership, buy-sell or corporation redemption agreements which may be in place.
- Y Any prior pre-nuptial or post-nuptial agreements.
- Y Any other information which you think might be pertinent.

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