



## **How To Guide**

# Preparing for your Estate Planning Meeting

---

## **In This How to Guide**

- Think about your Estate Planning Objectives
- Completing your Confidential Estate Planning Organizer
- Bring Relevant Documents with you to your Appointment

Now that you have scheduled your complimentary consultation with your Estate Planning Attorney, you can begin preparing for your appointment. Taking time to prepare for your consultation will not only help you get the most out of your meeting but will help the attorney identify your estate planning goals and provide the best advice possible.

## Think about your Estate Planning Objectives

Whether you are preparing an estate plan for the first time or updating your current plan, take some time to think about what your lifetime objectives are, as well as your objectives after you have passed away. A comprehensive estate plan provides for planning measures not just after you have passed away, but during your lifetime as well. Some important things to consider for your estate planning meeting are:

- If you become incompetent or incapacitated, who would you want to make medical decisions on your behalf?
- If you become incompetent or incapacitated, who would you want to make financial decisions on your behalf?
- After you have passed away, how would you like your property distributed and who would you like it distributed to?
- After you have passed away, who would you like to handle the administration of your estate?
- After you have passed away, who would you like to be guardian or trustee of your minor children?
- In the event you need to go into a nursing home, how will you pay for nursing home care?

Remember these are suggestions on what to consider for your appointment so don't feel pressured to have any decisions made prior to your consultation.

## Complete your Confidential Estate Planning Organizer

The Confidential Estate Planning Organizer will give your Attorney a quick overview of your planning goals, assets, and family information. By completing the organizer ahead of time, this will allow your



attorney to spend more time identifying your goals, advising on legal matters, and creating a comprehensive estate plan. Remember, all information provided is confidential and handled with the appropriate level of care.

We recognize that putting together the organizer will take some people considerable time and sometimes we are asked why it is needed. 100 years ago you may have been able to just have a Will that directs property to your beneficiaries, but our financial lives are not as simple anymore. For example, if your Attorney identifies that you own retirement accounts or life insurance policies, those assets will not be addressed through the Will but instead you will be advised how to complete the beneficiary designations on those accounts.

You should consider the first step in preparing your estate plan as completing the organizer and outlining all of your assets and accounts in an organized manner.

## **Bring Relevant Documents With You to Your Appointment**

If you would like us to review your prior estate planning documents (Ex: Will, Health Care Proxy, Power of Attorney, HIPPA Release, etc.), please send us the signed copies prior to your intake meeting. If your prior documents are more than 10 years old or you are sure you want to implement new documents, you do not need to send us your old ones. However, if you are the donor, trustee, or trust beneficiary, we will need to see a copy of the trust. Other documents you may want to bring with you include:

- Deeds, Title Insurance Policies, Recent property appraisals, real estate bills
- Prenuptial and/or postnuptial agreements
- Gift Tax Returns
- State or Federal Estate Tax Returns for a deceased spouse
- Bank and/or Account statements with recent account values

Being prepared for your estate planning meeting is always the best practice but don't stress if you are unable to locate a document in time for your appointment.

