How To Prepare For Your Family Estate Planning Session

First of all, you will want to complete an "Estate Planning Worksheet," which is a great first starting point for you to get your affairs organized. The planning process is extremely helpful in that regard. We are going to make organization even easier for you after you meet with us. You will return your worksheet before your scheduled meeting so your lawyer will have an opportunity to thoroughly review your worksheet and will be ready to advise you when you come for your meeting.

Next, you will want to begin gathering bank account statement, brokerage statements, grant deeds, life insurance information, corporate record books (if you are a business owner), and retirement plan statements. Don't worry if you can't find everything. Again, this is just a starting point and we will help you gather everything you need throughout our process. Please keep all the documents in a folder and be sure to bring the folder to your planning session.

Now would also be a good time to request beneficiary designation change forms from your insurance company, retirement account custodians, or from your HR department if you have work-related benefits. While you won't need those right away, you will need them eventually and starting now can't hurt.

If you have any trouble gathering any of this information, do not hesitate to give us a call…we're here to help.

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