What should I bring to my first estate planning consultation?

Most of our clients don't bring any records for their first estate planning appointment. You probably already know the answers to all of our questions. We will discuss:

- The names of your family members and other important people in your life.
- The people you trust to make financial and healthcare decisions for you and your estate.
- What you want your plan to accomplish and how you want your estate divided at the end of your life.
- The names of people you would trust to care for minor children, if you have any.

Other information that might be helpful:

- Prior estate planning instruments.
- Deed(s) to your real estate (if easily available).
- Addresses of people who will make financial and healthcare decisions in your plan.
- A basic knowledge of your assets and their approximate value.

Please remember that the most important thing is that you start the process and attend your first appointment. Too many people never create an estate plan because they worry about having the necessary information in perfect order. You can always provide more records later, if needed. Answering one of our attorney's questions about your values and intentions is the most important part of the process and usually provides us what we need to create your new plan.

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