# *What to bring to your consultation:*

***Bring as many of the applicable items listed below as possible. The more accurate information we have, the better we can serve you and your family during our initial consultation. Recommended items are listed below:***

- Method of Payment
- ***Completed detailed questionnaire provided by our office***
- ***Copy of valid photo ID for client and/or spouse***
- Copy of death certificate, if applicable
- Copy of deed to any property owned by client and/or spouse
- Copies of the most current bank statements, in their entireties, for all accounts (including CDs) titled in client's and/or spouse's name; And current, asset account statements (IRA, Annuity, etc)
- Copy of life insurance policies with verification of face and cash values for client and/or spouse
- ***Copy of existing estate planning documents including will, durable power of attorney, living will, and health care power of attorney for client and/or spouse***
- ***Copy of the Guardianship Order, if applicable***

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