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## Documents Needed for Estate Planning

Estate Planning is different for everyone. It can include an evaluation of anything that concerns you or about which you have questions. However, as a general rule, we need to see the following documents to review your estate plan.

1. A photocopy of your most recent Will, power of attorney and advance directive for healthcare;
2. A photocopy of any trust created by you or that benefits you;
3. A photocopy of the Articles of Organization, Operating Agreement, Partnership Agreement or Subscription Agreement for any corporation, limited liability company, partnership, limited partnership interest or family business you own;
4. A blank change of beneficiary form for each of your retirement accounts;
5. A recent statement for each annuity contract you own;
6. A blank change of beneficiary form for each annuity contract;
7. A photocopy of a recent annual statement for each life insurance policy you own on your own life or on anyone else (such as children or grandchildren);
8. A blank change of beneficiary form for any employer provided life insurance; and
9. A blank change of beneficiary form for each life insurance policy you own on your own life or on anyone else (other than employer provided life insurance);
10. Deeds for all real estate you own.
11. A balance sheet or other documentation showing other assets you own.

*Note: At first glance, some of the documents requested above may not appear to be related to your estate plan. However, it is generally worthwhile to review them because assets that pass to beneficiaries (e.g., life insurance proceeds or retirement accounts), and assets that are titled with rights of survivorship may pass outside your Will. If this occurs, then your estate may or may not pass to those persons named in your Will.*