



## **RAVEN LAW OFFICE, PLLC**

### WHAT TO BRING TO YOUR FIRST ESTATE PLANNING APPOINTMENT

It is helpful if you bring the following to the initial meeting:

- Basic financial statement listing assets and liabilities
  - Confirmation of account owners
  - Confirmation of any beneficiary designations
- Your current estate planning documents
- Real estate deeds, land contracts, and property tax notices
- Promissory notes or contracts
- For business owners, copies of your Articles of Incorporation or Organization, Operating Agreements, Buy-Sell Agreements, Redemption Agreements, or Stock Certificates
- Pre-nuptial agreements or divorce judgments
- Legal names, addresses, and telephone numbers for any persons you want to designate as a beneficiary
- Legal names, addresses, and telephone numbers for any persons you want to designate as a fiduciary (personal representative, trustee, agent, or patient advocate)
- Any other information you think may be pertinent