



# INTEGRITY LAW

## Wills & Trusts

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## Estate Planning Organizer

What to Gather Before Meeting With an Attorney

**You do not need to have everything figured out before your appointment.** This organizer simply helps you gather important information and think through the people, property, and decisions that may be part of your estate plan.

### 1. About You

Your full legal name

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Spouse/partner

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Phone

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Email

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### 2. Family & Beneficiaries

- Names of children and other people you may want to inherit
- Any minor children or grandchildren
- Any beneficiary who may need help managing an inheritance
- Any special family circumstances you want the attorney to know about

### 3. Real Estate

- Primary residence
- Rental property
- Vacation home or cabin
- Vacant land, commercial property, or other real estate
- Property located outside Utah

**Helpful to bring:** recent property information or deeds if readily available.

## Your Financial Picture

Approximate values are fine. You do not need exact balances for an initial discussion.

### 4. Bank & Investment Accounts

- Checking and savings accounts
- Money market or certificates of deposit
- Non-retirement brokerage or investment accounts
- Other significant financial accounts

### 5. Retirement & Insurance

- 401(k), 403(b), pension, or other employer retirement plans
- Traditional or Roth IRAs
- Life insurance policies
- Annuities
- Current beneficiary designations, if available

### 6. Business Interests & Other Property

- LLC, corporation, partnership, or other business ownership
- Vehicles, RVs, boats, or recreational vehicles
- Jewelry, collectibles, firearms, artwork, or other valuable property
- Mineral rights or other unusual assets
- Expected inheritance or other significant property concerns

### 7. Existing Estate Planning Documents

- Will
- Trust
- Durable power of attorney
- Healthcare directive
- Prior amendments or other estate-planning documents

**Helpful to bring:** copies of existing documents if you have them.

## People You May Want to Name

You do not have to make final decisions before meeting with the attorney.

### 8. People to Consider

Successor trustee

Financial power of

attorney

Healthcare

decision-maker

Guardian for minor

children

Backup choices

### 9. Questions & Special Concerns

- Avoiding probate
- Protecting or planning for minor children
- Blended family or second marriage
- A beneficiary with special needs
- Unequal distributions or specific gifts
- Real estate or business succession
- Concerns about a beneficiary receiving money outright
- Other family or financial concerns

### Questions I Want to Ask

#### Ready to get started?

Integrity Law focuses on wills and trusts and helps Utah families create estate plans around their property, family, and goals.

**Contact Integrity Law to schedule a free estate planning consultation.**