What to bring to your consultation:

Bring as many of the applicable items as possible to our initial consultation. The more accurate information we have the better we can serve you and your family.

- 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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