

## Estate Planning Checklist

By Bernadette L. Puzzuole, Esq.

If you have decided to consult an attorney for estate planning purposes, you can make that visit more productive if you bring the following information and/or documents to the meeting:

- Any existing wills, trusts, powers of attorney and living wills that were prepared for you;
- Any agreements that may affect your estate planning, such as pre- or post-nuptial agreements or property settlement agreements arising from a divorce or separation;
- Your most recent income tax returns and any federal gift tax returns that have been filed by you;
- Life insurance policies and most recent statements;
- If your spouse is deceased, the estate and inheritance tax returns filed by the estate of your deceased spouse;
- List of all members of your immediate family, including your spouse, children, grandchildren, parents and siblings. List their names, addresses and ages (even if you do not intend to name the person in your estate), and any special needs they may have.
- A detailed list of Assets. As to stock and other securities, copies of your most recent brokerage statements; as to real estate holdings, your most recent tax bill.
- If you are employed or retired, a detailed list of your employee benefits, including pension, profit sharing, 401K, medical insurance and life insurance benefits.

By having this information with you when you meet with your attorney you will save time and be able to focus the meeting on your estate planning needs.

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