

Estate Planning Meeting Checklist

What to Bring & Prepare Before Your Appointment



Personal Information

- ☐ Full legal names (you & spouse/partner)
- ☐ Dates of birth
- ☐ Contact info (email, phone, address)
- ☐ Social Security numbers (optional)
- ☐ Marriage certificate / divorce decree (if applicable)
- ☐ Names and birthdates of children/dependents
- ☐ Prior estate planning documents (old wills/trusts)



Family & Beneficiary Info

- ☐ Names/contact info for beneficiaries and heirs
- ☐ Notes about any special needs, minor children, or blended families
- ☐ Preferred guardians for minor children
- ☐ Backup choices for executor, trustee, guardians, etc.



Financial Information

Bank & Investment Accounts:

- ☐ Statements for checking, savings, and money market accounts
- ☐ Investment accounts (brokerage, mutual funds, stocks, etc.)
- ☐ Retirement accounts (401(k), IRA, pension)

Real Estate:

- ☐ Deeds to any property you own
- ☐ Mortgage statements
- ☐ Property tax bills

Insurance Policies:

- ☐ Life insurance policy documents
- ☐ Long-term care or disability insurance (if applicable)

Business Interests:

- ☐ Business ownership documents
- ☐ Operating or buy-sell agreements
- ☐ Business valuation (if available)



Liabilities (Debts)

- ☐ Mortgage balances
- ☐ Credit card balances
- ☐ Auto, student, or personal loans
- ☐ Any promissory notes or obligations



Estate Planning Goals

- ☐ Decision-maker for financial matters (power of attorney)
- ☐ Decision-maker for medical care (healthcare agent)
- ☐ Specific gifts or property bequests
- ☐ Funeral, burial, cremation preferences
- ☐ Charitable giving goals (if any)



Digital Assets

- ☐ List of key digital accounts (email, cloud, banking, crypto)
- ☐ Password manager access or instructions (optional)
- ☐ Social media accounts & legacy preferences



Legal Documents (If You Have Them)

- ☐ Prior will or trust
- ☐ Financial power of attorney
- ☐ Healthcare directive / living will
- ☐ Property deeds or vehicle titles
- ☐ Prenup or postnup agreements
- ☐ Adoption or guardianship papers
- ☐ Military discharge papers (DD214)



Miscellaneous

- ☐ Safe deposit box location/info
- ☐ List of valuable or sentimental personal items
- ☐ Instructions for pets or named caretaker

Tip:

Don't worry if you can't find everything — bring what you can! Your attorney will help you fill in the gaps and guide next steps



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