

## Gromowski Law Firm, LLC

## Estate Planning Documents to Bring to your 1st Appointment

## Please bring the following documents with you to your 1<sup>st</sup> meeting:

- 1. All estate planning documents whether they are old or current. These include: Wills, Marital Property Agreements, Living Trust, Irrevocable Trust, Power of Attorney for Health Care, Power of Attorney for Finances, Final Dispositions, etc.
- 2. Copies of all deeds to your home and other real estate, including any life estate, time shares, and tax bills.
- 3. Names, complete addresses, and phone numbers of all beneficiaries, heirs, and potential agents, trustees, and personal representatives.
- 4. All investments policies, including bank accounts, cds, annuities, life insurance, IRAs, bonds, stocks, and retirement plans. Papers that show the approximate value and who are the beneficiaries.
- 5. Life insurance policies that show cash values, beneficiaries, and death benefits.
- 6. Long term care policies.
- 7. All documents concerning your business.
- 8. All funeral insurance or burial information.
- 9. List of debts and liabilities.

Gromowski Law Firm

Office: 757 S. Main Street, Suite #5 Fond du Lac, WI 54935 Mailing: P.O. Box 149 Mayville, WI 53050