Attorney
Counselor
Mediator

Gromowski Law Firm, LLC

Estate Planning Documents to Bring to your 1st Appointment

Please bring the following documents with you to your 1st 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 labilities.

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