

Before You Meet the Estate Attorney

You do not need to have everything perfect or complete. This checklist is simply a guide to help the conversation go more smoothly.

1. Gather What You Already Have

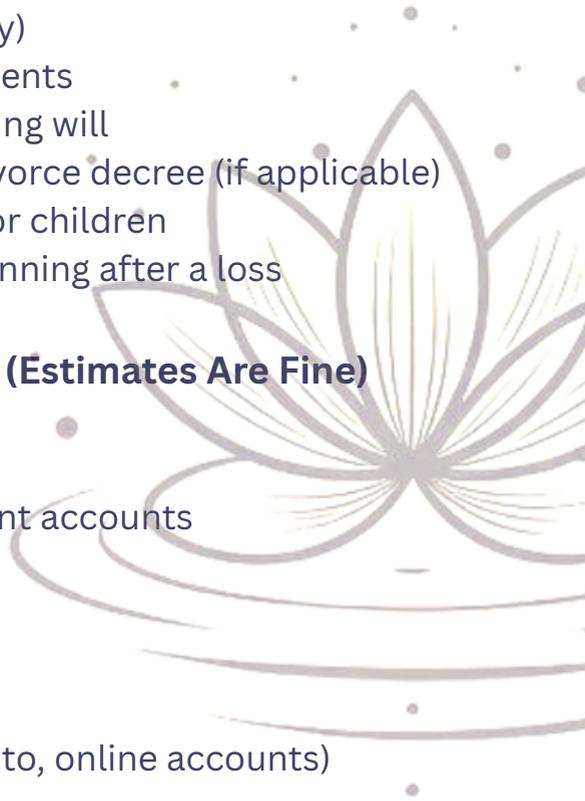
- Existing will or trust (if any)
- Power of attorney documents
- Health care directive / living will
- Marriage certificate or divorce decree (if applicable)
- Birth certificates for minor children
- Death certificate(s), if planning after a loss

2. Bring a Basic Asset List (Estimates Are Fine)

- Real estate you own
- Bank accounts
- Retirement and investment accounts
- Life insurance policies
- Business interests
- Vehicles
- Valuable personal items
- Digital assets (email, crypto, online accounts)

3. Know Where Important Things Are Kept

- Deeds and property records
- Insurance policies
- Account statements
- Safe deposit box or home safe location
- Online password manager or instructions



4. Think About the People Involved

- Who would you want to make decisions if you couldn't?
 - Who should care for minor children?
 - Who should manage money for children or beneficiaries?
 - Are there people you do not want involved?
- You don't need final answers—just initial thoughts.

5. Consider These Personal Questions

- Are there specific items you want certain people to receive?
- Are there family dynamics your attorney should be aware of?
- Are there concerns about conflict, addiction, or financial responsibility?
- Are there charitable causes you care about?

6. Write Down Your Questions

Common examples:

“Do I need a will or a trust—or both?”

“What happens if I do nothing?”

“How often should I update this?”

“What should I tell my family after this is completed?”