



**It would be helpful to bring copies of any of the following documents that you may have:**

1. Wills.
2. Trusts.
3. Living Wills.
4. Powers of Attorney.
5. Long-Term Care Insurance Policies.
6. Deed and Survey to Real Estate.
7. Copy of Real Estate Tax Bill.
8. Health Insurance Policy.
9. Existing Nursing Home Contract, if any.
10. Existing Life Insurance Policies.
11. A letter from each life insurance company indicating the following information with respect to the policy:
  - a. face value
  - b. death benefit
  - c. cash value
12. Copies of all current bank and financial statements.
13. Complete copies of any Annuities.
14. Copies of any Notes or Mortgages Receivable.