



Thank you for contacting the Jordan Balkema Elder Law Center, PLLC

WHAT SHOULD I BRING TO MY FIRST APPOINTMENT?

It is helpful if you bring the following items to the initial meeting:

- A basic financial statement listing assets and liabilities and showing whose name assets are titled in and beneficiary designations
- A copy of your current will or trust, if you have one and copies of any other existing estate planning documents
- Copies of any deeds to real estate, the most recent property tax statements for real estate and any documents regarding real estate which may restrict use or transfer
- Copies of promissory notes or contracts if anyone owes you money
- If you own a business; copies of any partnership, buy-sell or corporation redemption agreements which may be in place.
- Any prior divorce judgments or pre-nuptial agreements
- Any other information which you think might be pertinent