

How to prepare for our first consultation

Most of our consultations take place over Zoom, so having these items within reach when we connect would be a great idea. Gather what you can; if something is missing, we can still begin.

Getting ready for Zoom

- ☐ **A computer, tablet, or phone with a camera and microphone** — and the Zoom link from your confirmation; join a few minutes early to test your sound
- ☐ **A quiet, private space** — somewhere you can speak freely about your family and finances

If you are beginning or updating your estate plan

- ☐ **A list of what you own** — home, bank and investment accounts, retirement accounts, life insurance, vehicles, business interests
- ☐ **Copies of any existing documents** — wills, trusts, powers of attorney, health care documents
- ☐ **Names** — family members, and anyone you are considering as a personal representative, trustee, guardian, or agent

If you are settling an estate

- ☐ **The death certificate**
- ☐ **The original will**, if there is one
- ☐ **A list of known debts and assets**

If you are considering a guardianship

- ☐ **Knowledge of the type and location of the potential Ward**
- ☐ **A determination of whether this is an emergency situation**
- ☐ **A list of names and addresses of the next of kin**
- ☐ **A summary of the person's medical situation**
- ☐ **Knowledge of whether the potential Ward had advance directives**

Please don't email documents before your consultation. If we need copies, we will tell you the best way to share them.

YOUR QUESTIONS (NO QUESTION IS TOO SMALL)