MATERIALS FOR ESTATE PLANNING MEETINGS

1. Copies of present estate planning documents, including last wills and testaments, trusts, powers of attorney

2. Copies of the present ownership in real estate, including deeds and real estate contracts

3. Last two years' income tax returns

4. A financial statement indicating approximate values for estate and the cash value and death value for life insurance policies

5. A listing of the full names, addresses and dates of birth of family members, including parents, siblings, children, and/or grandchildren

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