THE LAW OFFICE OF KEITH R. MILES, LLC

ADMITTED IN GEORGIA AND NORTH CAROLINA BARS

www.EstatePlanEsq.com

ITEMS NEEDED FOR ESTATE PLANNING REVIEW

Please bring as many of the following items that you can to our first meeting. This will help us prepare a thorough and accurate estate plan review.

1. Please bring copies of the following documents, if you have them.

   - ☒ Wills
   - ☒ Trusts
   - ☒ Health Care Powers of Attorney and Living Wills
   - ☒ Financial or General Durable Powers of Attorney
   - ☒ Long Term Care Insurance Policies, if any.

2. Please also bring the following financial information, if it applies to you.

   - ☒ Current bank statements (even if the account is a joint bank account).
   - ☒ Deeds for any real estate.
   - ☒ Promissory Notes or mortgages for any loans you have made to others.
   - ☒ Current brokerage statements.
   - ☒ Current mutual fund statements.
   - ☒ Copies of any Savings Bonds.
   - ☒ Annuity contracts, recent annuity statements, and current beneficiary designations.
   - ☒ Life insurance policies, recent statements, and current beneficiary designations.
   - ☒ Qualified retirement account statements (such as an IRA, 401(k), 403(b)) and current beneficiary designations.
   - ☒ Current statements for any debts (car loan, mortgage, etc.).
   - ☒ Current automobile titles.
   - ☒ Cemetery deeds and prepared funeral expense information.

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