

Checklist

Estate Planning — Trust Meeting



ESTATE PLANNERS
OF ARKANSAS, P.A.

Before your scheduled meeting with Estate Planners of Arkansas, it is helpful if you think about:

1

The Paperwork

Who should be named as the person who would handle paperwork and control your assets if you were unable to do so? (This can be a family member, friend, or a trust department at a bank.)

2

Your Assets

Who do you want to leave your assets to when you pass away? What if those people have passed away before you? Who is your backup choice?

3

Children

If you have children under 18, who do you want to raise them?

What should I bring to the first meeting?

It is helpful, although not required, if you bring the following items to the initial meeting or mail them to the law office prior to the initial meeting:

- A copy of your current will(s), if you have one, and copies of any other existing estate planning documents.
- Copies of any deeds to real estate.
- Copies of promissory notes or contracts if anyone owes you money.
- If you own a business, copies of any partnership, buy-sell or corporate redemption agreements which may be in place.
- Copies of bank statements, investment statements, retirement and annuity accounts, life insurance policies, etc. If you are not able to make copies, just bring the originals and we will be happy to make copies.
- A list of assets and liabilities showing whose name assets are titled in. Assets include investments, real estate, personal property, life insurance death benefits, IRA, and pensions.

The total value of assets is not required to be disclosed to anyone, but, if you choose to disclose this information, potential probate costs, tax considerations, and other costs or concerns can be analyzed. Exact values are not necessary since valuations change over time anyway, but knowledge of approximate net worth and the types of assets will be helpful.