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DOCUMENTS TO BRING FOR FIRST GUARDIAN/CONSERVATOR MEETING

Please bring copies (or originals - we can copy and return the originals to you) of any of the following documents:

- ❖ Medical reports or evaluations, if any
- ❖ Any existing will or trust
- ❖ Any existing power of attorney
- ❖ Living will, health care directive or power of attorney
- ❖ Any trust agreement or will establishing a trust of which the ill person is or may become a beneficiary, or under which he/she holds power of appointment
- ❖ Documents indicating financial loss to which financial incapacity contributed

Once we begin the matter, we may ask you for the following documents as well:

- ❖ Deeds to real property, promissory notes and deeds of trust, mortgages and copies of recent tax assessments
- ❖ Recent statements showing balances and manner of titling for: checking, savings, CD, mutual funds, brokerage accounts, treasury direct accounts, dividend reinvestment plans, IRA, Keogh, 401K and/or other retirement accounts (and beneficiary designations)
- ❖ Individual stock certificates
- ❖ Documents reflecting ownership of assets such as treasury bills or notes and limited partnerships
- ❖ Insurance policies and/or annuity contracts (and beneficiary designations)
- ❖ Divorce, separation or prenuptial agreements