

**WHAT TO BRING
FOR THE INITIAL ESTATE PLANNING MEETING**

- Any and all real property deeds
- The 1st page of all financial accounts, including bank statements, brokerage accounts, IRA's, 401K's, 403B's, etc.
- Life insurance policies
- General property insurance policies
- Bylaws and/or Operating Agreements relating to any business interests that you own (e.g., corporations, LLCs, partnerships, etc.)