

LAW OFFICES OF
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WHAT TO BRING TO YOUR INITIAL CONSULTATION

In addition to the questionnaire (completed to the best of your ability), please bring the following documents with you:

1. Most recent account statements for all of your accounts;
2. Last deed(s) of record for any and all real estate owned (or stock certificates for any co-operative apartments), along with a recent real estate tax bill for all such property;
3. Copies of any Wills, Powers of Attorney, Medical Proxies, Living Wills, Trust Agreements, and any other legal documents (do NOT unstaple any document);
4. Copies of any long-term care insurance policies; and
5. Any other documents that you deem relevant.