

Please bring copies of all of the following documents to your appointment:

1. Wills (do NOT unstaple).
2. Trusts.
3. Health Care Proxies.
4. Living Wills.
5. Powers of Attorney.
6. Long-Term Care Insurance Policies.
7. Medical Insurance Policy.
8. Existing Nursing Home Admissions Agreement, if any.
9. Copies of all current bank statements.
10. Deed Survey to Real Estate.
11. Copy of Real Estate Tax Bill.
12. Copies of any Notes or Mortgages Receivable by you.
13. Most current statements from Stock Broker.
14. Most current Mutual Fund statements.
15. Copies of all bonds.
16. Complete copies of any Annuities.
17. Existing Life Insurance Policies.
18. A letter from each life insurance company indicating the following information with respect to the policy: face value, death benefit & cash value.
19. Most current statement for IRA account.
20. Most current statement of Qualified Retirement Account (Non-IRA).
21. Copy of most recent Federal and New York State Income Tax Returns.