What to Bring to Your Wills & Trusts Consultation

From the desk of Gaughan & Connealy Estate Planning Attorneys

So... you're getting your affairs in order. First of all, you're already ahead of the game. Second of all, let's make sure your first meeting is smooth, efficient, and, dare we say... kind of enjoyable. Here's your checklist:

BASIC INFO

- Driver's licenses (you and spouse/partner, if applicable)
- Full legal names and contact info for:
- Spouse or partner
- Children
- Guardians for minor children
- People you'd like to name as your Trustees, Executors, etc.

BENEFICIARY INFO

- Names and relationships of beneficiaries
- Any special considerations (e.g., special needs, health conditions, spendthrift concerns)

BONUS: BRING YOUR QUESTIONS WE LOVE QUESTIONS. WHETHER IT'S "HOW DOES PROBATE WORK?" OR "IS NAMING MY DOG AS A BENEFICIARY LEGAL?" (SPOILER ALERT: NOT REALLY), BRING IT ON.

ASSETS & LIABILITIES

- Deeds or address info for any real estate you own
- Bank account info (names of institutions and account types only—no need to bring account numbers)
- Investment/brokerage accounts (again, types and institutions)
- Retirement accounts (IRAs, 401(k)s, pensions, etc.)
- Life insurance policies
- Business ownership documents (if applicable)
- Approximate value of any significant assets: vehicles, collections, or heirlooms

YOUR DECISIONS

- Who will raise your children if you can't?
- Who will make financial decisions for you if you're incapacitated?
- Who will make medical decisions on your behalf?
- At what age(s) should beneficiaries receive their inheritance?