



Let's get your assets protected! We will begin by asking several important questions:

1. Have you previously created a will or trust and/or has someone prepared one on your behalf? If so, where is that document housed?
2. What are your goals passing on your assets to your beneficiaries? Please list any specific legacy related items which matter most to you.
3. Which individuals will be impacted by the creation of your will or trust (first and last names, along with current contact information)?
4. List your most valuable assets (i.e. heirlooms, jewelry, handbags, artwork, furniture, vehicles, real estate, etc.) If any of these assets have been promised to any heirs, please also list their full names and contact information here.

11. Where are your estate related documents and files stored and how can access be gained to them once you pass away?

12. Provide current contact information for your tax professional/accountant.

13. Do you own a business or multiple businesses? If so, do you have a transition plan in place?

14. Do you have pets? If so, who would you like to take care of them?

15. Additional requests/notes not listed above: