Burke & Casserly, P.C.
ATTORNEYS AT LAW

CHECKLIST OF ITEMS TO BRING TO OUR OFFICE FOR INITIAL CONFERENCE

(not all may apply to your situation)

- ✓ Prior Wills and Codicils
- ✓ Existing Trust documents where you are donor or beneficiary
- ✓ Power of Attorney
- ✓ Living Will and/or Health Care
- ✓ Deeds to Real Property
- ✓ Recent Property or School Tax Bill associated with Deeds
- ✓ Real Property Appraisals, if any
- ✓ Business (partnership/shareholder)
- ✓ Qualified Plan/IRA documents, including the following
  - ✓ Plan and Amendments
  - ✓ Summary Plan Description and any material modifications.
  - ✓ Summary Annual Report (SAR)
  - ✓ Statement of Accrued Vested Pension Benefit
  - ✓ Explanation of Pre-retirement Survivor Benefits
- ✓ A copy of any current beneficiary elections that have been executed by you
- ✓ Insurance and Annuity Policies
- ✓ Prior Gift Tax Returns
- ✓ Most Recent Federal Income Tax Return
- ✓ Form 5329, if any, filed with your federal income tax return making the "grandfather" election
- ✓ Pre-Nuptial Agreements
- ✓ Separation Agreements or Divorce Decrees
- ✓ Waiver of Right of Election