

Handelman Law Office

Wills, Trusts, and Estate Planning Checklist

When we meet to discuss your needs in the area of wills, trusts and estate planning it will be useful to have as much of the following items of information and documents as you believe may apply to your circumstances. The list is not exhaustive and the information all remains confidential.

_____ Existing wills, deeds trusts and powers of attorney

_____ Full names and dates of birth of clients and children/stepchildren and potential will/trust beneficiaries

_____ Address and phone numbers for individuals you may name in any powers of attorney or living will

_____ Designated persons to serve as executor/guardian/trustee at some stage
Address of any owned real estate

_____ Legal names of any charitable organizations you wish to receive a gift when either or both spouses are deceased

_____ Name and email address for any financial advisers who may be involved in the planning process

Do not be concerned if you are not able to make decisions about choosing individuals to serve in advance or do not have all of this before we meet- everything can be supplemented as needed.