Gudorf Law Group, LLC
Smart Planning for Worry-Free Living

Items to Bring for Estate Planning

Design Meeting Documents

1. Non- Financial Documents
- Identification – picture ID (driver's license, state ID)
- Social Security card(s)
- Birth verification (birth certificate, baptismal certificate, or school record with date of birth)
- Marriage certificate or death certificate/divorce decree of spouse
- Names, addresses, phone numbers and social security numbers of all children/potential beneficiaries
- Names, addresses, phone number of intended helpers (if different than children, eg. Power of Attorney, Executor, etc.)
- Listing of assets sold or given away in the last 5 years
- Military discharge records including copy of M-214
- Recent Family Photo

2. Legal Documents
- Most recent Health Care POA, Living Will, General Durable Power of Attorney, Will
- Trust documents
- Business entity/partnership agreements

3. Non-Liquid Assets
- Deeds, land contracts, property agreements for all real estate along with county property tax records
- Itemized list of all business/farm equipment

4. Liquid Assets (for all current accounts)
- Bank and credit union statements (checking, savings, CDs, money market, etc.)
- IRA/401(k) account statements
- Brokerage account statements

5. Insurance and Annuities
- Most recent Annuity/Life Insurance annual/quarterly statements
- Long-term care policies
- All auto, homeowners and umbrella policies declaration pages

6. Income, Expenses and Taxes
- Income tax returns and 1099s for the last two years
- Gift tax returns

Delivery Meeting Documents

1. Non- Financial Documents
- See Design Meeting Documents

2. Legal Documents
- See Design Meeting Documents

3. Non-Liquid Assets
- Titles to all vehicles, motor crafts, jet skis and trailers
- Itemized list of all Non-United States Assets
- Itemized list of precious metals/coins
- Digital wallet/inventory of crypto currency **(NOT THE KEY)**
- Cemetery lot records (deed or certificate)
- Stock certificates
- Savings bonds
- Promissory notes or loans (owed to you)

4. Liquid Assets (for all current accounts)
- See Design Meeting Documents

5. Insurance and Annuities
- All Annuity/Life Insurance contracts and policies
- Cancer and accidental death policies
- Pre-need funeral contracts for burial or cremation

6. Income, Expenses and Taxes
- See Design Meeting Documents

7. Debt Information
- Mortgage statement
- Credit card statements
- Loan documents

THE FAMILY ESTATE & LEGACY PROGRAM™
Expertise. Confidence. Clarity.

In order to make the most efficient use of our time together it is very important that you upload your documents to your client portal in the corresponding folders. If you need to bring us hard copies, please make sure they are copies and not originals, of the above documentation and separate these items into seven (7) folders and bring to our office.

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