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

Items to Bring for Estate Planning

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
- Health Insurance Identification Card (for all insurance coverage including Medicare, Medicare Supplement and HSA)
- Legal names, addresses, phone numbers and social security numbers of all children/potential beneficiaries
- Legal names, addresses, phone number of intended helpers (If different than children, e.g., Power of Attorney, Executor,etc.)
- Listing of assets sold or given away in the last 5 years
- Military discharge records including copy of DD214
- 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
- Titles to all vehicles, motor crafts, jet skis and trailers
- Itemized list of all business/farm equipment
- 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)

- Bank and credit union statements (checking, savings, CDs,money market, etc.)
- IRA/401(k) account statements
- Brokerage account statements

5. Insurance and Annuities

- All Annuity/Life Insurance contract and policies
- Most recent Annuity/Life Insurance annual/quarterlystatements
- Long-term care, cancer, and accidental death policies
- Pre-need funeral contracts for burial or cremation
- All auto, homeowners, and umbrella policies declaration pages

6. Income and Expenses

- Income tax returns and 1099s for the last two years
- Gift tax returns

7. Debt Information

- Mortgage statement
- Credit card statements (if not regularly paid off)
- Loan documents

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

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. A link will be provided to you, by email, 3 - 4 days prior to your scheduled appointment. 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.

Gudorf Law Group, LLC
8153 N. Main Street
Dayton, OH 45415

tgudorf@GudorfLaw.com
www.DaytonEstatePlanningLaw.com
937-898-5583
(03-24-22)