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What to bring to your appointment…

- Copies of any and all current estate planning documents you have in place
- Copies of any assets you are looking to discuss. If you have a bank account please bring in most recent bank statement or if you have a life insurance policy, bring the most current annual statement (most recent statements for all assets)
- Income information from all sources
- Full names of anyone either appointed in your current or you want in your future estate documents or any person receiving as a beneficiary under your estate plan
- Deeds to any real properties you may own

We look forward to assisting you in your estate planning needs.

The Woods Law Office