

## **Thank You for Consulting With Adrian & Pankratz**

### **WHAT SHOULD I BRING TO THE FIRST MEETING?**

It is helpful if you bring the following items to the initial meeting or mail them to the law office prior to the initial meeting:

- ✓ The completed Estate Planning Questionnaire.
- ✓ Copies of the most recent account statements mailed to you by banks or other institutions holding your assets.
- ✓ A copy of your current will(s) or trust(s), if any, and any copies of any other existing estate planning documents.
- ✓ Copies of any deeds to real estate, the most recent property tax statements for real estate.
- ✓ Copies of promissory notes or contracts if anyone owes you money.
- ✓ If you own a business, copies of any partnership agreements, operating agreements, buy-sell, or corporate redemption agreements which may be in place.

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