Burke & Casserly, P.C.
ATTORNEYS AT LAW

CHECKLIST OF ITEMS TO BRING TO OUR OFFICE FOR INITIAL CONFERENCE

(not all may apply to your situation)

- ✓ Summary of current assets including financial institution(s), name, balance, joint owners or beneficiaries (if any) and type of account (*our Estate Planning Worksheet can assist)
- ✓ Copies of prior Wills and Codicils
- ✓ Copies of existing Trust documents where you are donor or beneficiary
- ✓ Copy of Power of Attorney
- ✓ Copy of Living Will and/or Health Care
- ✓ Deeds to Real Property
- ✓ Recent Property or School Tax Bill associated with Deeds
- ✓ Real Property Appraisals, if any
- ✓ Business (partnership/shareholder)
- ✓ Current balances and beneficiary designations on Qualified Plan/IRA documents, and Insurance and Annuity Policies
- ✓ A copy of any current beneficiary elections that have been executed by you
- ✓ Information on prior gifts made in excess of Federal gift tax exclusion – amount for which a gift tax return may have been filed
- ✓ Most Recent Federal Income Tax Return
- ✓ Information regarding or copies of Pre-Nuptial Agreements, Separation Agreements or Divorce Decrees, or Waiver of Right of Election

Burke & Casserly, P.C.
255 Washington Avenue Ext. Ste. 104
Albany, New York 12205

Telephone (518) 452-1961
Facsimile (518) 452-4230
Email cterzian@burkecasserly.com