

DAVIDOW, DAVIDOW, SIEGEL & STERN, LLP

INFORMATION GUIDE

In order to make your consultation productive, please review this guide and make a list of all requested information. Feel free to put this list together in any format you find comfortable, limiting it to one or two pages, if possible.

A. PERSONAL INFORMATION:

1. Please prepare a list of legal names, current addresses, phone numbers, and Social Security numbers for you, your children or other intended beneficiaries, executors, trustees or agents.

B. FINANCIAL INFORMATION:

1. REAL PROPERTY HOLDINGS - include current owner(s) and value - please bring in all DEED(S), PROPERTY TAX BILLS and SURVEYS for all real property
2. BANK ACCOUNTS (checking, savings, CDs, money markets) - include account holder(s) and current values
3. STOCKS, BONDS, TREASURY BILLS, MUTUAL FUNDS - include owner(s) and current values
4. IRA=s, 401K=s, 403B=s, OTHER RETIREMENT PLANS - include owner(s), beneficiaries and current values
5. ANNUITIES, OTHER SIMILAR ASSETS - include owner(s), beneficiaries and current values
6. LIFE INSURANCE - include policy, owner, beneficiaries, death benefit and cash surrender value
7. LONG TERM CARE INSURANCE - All information regarding policies including amount of daily benefit and duration of policy
8. ANY OTHER ASSETS
9. MONTHLY INCOME, including Social Security or other pensions

C. EXISTING ESTATE PLANNING DOCUMENTS:

Please bring in any existing documents such as:

- I. LAST WILL(S) AND TESTAMENT
- II. TRUST(S)
- III. POWER(S) OF ATTORNEY
- IV. LIVING WILL(S) AND/OR HEALTH CARE PROXY(IES)

1050 Old Nichols Road - Suite 100
Islandia, New York 11749
(631) 234-3030 Fax: (631) 234-3140

13235 Main Road
Mattituck, New York 11952
(631) 234-3030 Fax: (631) 234-3140

666 Old Country Road - Suite 810
Garden City, New York 11530
(516) 393 0222 Fax: (516) 228 6672