DAVIDOW, DAVIDOW, SIEGEL & STERN
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 bring a government issued photo identification with you to the consultation
2. Please prepare a list of **legal names** (as they appear on government issued identification), current **addresses**, **phone numbers**, **e-mail addresses** 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, CD's, 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:

1. LAST WILL(S) AND TESTAMENT
2. TRUST(S)
3. POWER(S) OF ATTORNEY
4. LIVING WILL(S) AND/OR HEALTH CARE PROXY(IES)

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