VIRGINIA ESTATE
& TRUST LAW

Estate Planning Pre-Meeting Document Checklist

Our initial meeting will be more productive if you are able to provide in advance as many of the documents listed below as possible. Please do not be concerned, however, if you cannot provide everything for the first meeting.

- ☐ Current wills, trusts, powers of attorney, and advance medical directives
- ☐ Information regarding employment benefits, including retirement plans and group life insurance policies
- ☐ Life insurance annual policy statements
- ☐ Deeds to real estate
- ☐ Recent statements for all bank and brokerage accounts
- ☐ Any trust agreements that name you or your spouse (if any) as a beneficiary
- ☐ Previously filed gift tax returns
- ☐ Most recent personal financial statements and income tax returns
- ☐ Property settlement agreements, divorce decrees, separation agreements from prior marriages
- ☐ Premarital and marital agreements
- ☐ Financial statements and income tax returns for the last three years for each business, farm, partnership LLC, as well as the most recent income tax returns, partnership and operating agreements, buy-sell agreements, and other relevant documents.

Questions? Please contact your attorney directly.

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