

Planning Checklist

- ⌚ Last Will and Testament
- ⌚ Trust
- ⌚ Health Care Proxy
- ⌚ Living Will
- ⌚ Power of Attorney
- ⌚ Long-Term Care Insurance Policy
- ⌚ Medical Insurance Policy
- ⌚ Recent bank statements
- ⌚ Information regarding monthly income
- ⌚ Deed to Real Estate
- ⌚ Recent statements from Financial Institutions or Mutual Funds
- ⌚ Bonds or Stock Certificates
- ⌚ Existing life insurance policies or annuities
- ⌚ Recent statement for IRA or other Retirement account
- ⌚ Recent Tax Returns