

DOCUMENTS TO BRING TO YOUR INITIAL CONSULTATION

For your initial consultation, you should bring as many of the documents as possible on the checklist below. Of course, if you do not have certain of the documents requested, there is no reason to worry. It is not necessary to bring the originals. Copies are sufficient for the consultation. Finally, please note that all money or property, whether held inside or outside of New York State, should be disclosed to us.

1. Power of Attorney
2. Health Care Proxy
3. Living Will
4. Last Will and Testament, and any Codicils
5. A list of real property owned anywhere in the world. For each property, its purchase price, and an estimate of its current fair market value.
6. Deeds for properties owned. For co-op apartments, contact information for the managing agent.
7. Life insurance policies, including most recent statements of cash value or surrender value.
8. Latest statements or passbooks for all accounts (checking, savings, CD's, IRA's, mutual funds, securities).
9. Stocks or bonds not held in one of the above accounts.
10. Transfers or gifts of money or other property within the past 5 years -- amounts, dates and names of recipients.
11. Statements of any income received from any source, e.g., Social Security, pensions, war reparations.