



## ATLAS LAW GROUP

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### Estate Planning/Elder Checklist

Please provide the following documents to your consultation, if possible.

- \_\_\_\_\_ 1. Completed questionnaire;
- \_\_\_\_\_ 2. A copy of your last year's tax return;
- \_\_\_\_\_ 3. Copy of your most recent Last Will and Testament, if any;
- \_\_\_\_\_ 4. Copy of your Revocable and/or Irrevocable Trust, if any;
- \_\_\_\_\_ 5. Copy of your Durable Power of Attorney, if any;
- \_\_\_\_\_ 6. Copy of your Health Care Proxy, if any;
- \_\_\_\_\_ 7. Copy of your deed of residence and most recent real estate tax bill, if applicable;
- \_\_\_\_\_ 8. Copy of any medical and/or life insurance policies; and
- \_\_\_\_\_ 9. Any other information and/or documentation that you deem relevant.