Wealth Planning Document Checklist

Please provide our office with copies of:

<u>Personal Identification</u>

- ☐ California Driver License
- ☐ If a foreign citizen, please provide a copy of your passport(s)
- ☐ Copies of any public benefits that you or your beneficiaries are currently receiving or eligible to receive

<u>Prior Legal Planning Documents</u>

- ☐ Previous Will and Trust(s)
- ☐ Advance Health Care Directive or Health Care Power of Attorney
- ☐ Durable Power of Attorney

<u>Asset Information</u>

- ☐ "Grant Deed" for each real property owned, along with tax assessor parcel numbers
- ☐ Statements for all banking and investment accounts
- ☐ Life insurance policies currently in force
- ☐ IRA/pension account statements
- ☐ Documentation or statements of any other assets owned.

<u>Tax Information</u>

- ☐ Most recent Federal income tax returns, personal/business, etc.
- ☐ Gift Tax Returns filed
- ☐ If you have foreign bank accounts, TDF 90-22.1 forms filed