

WALLACE LAW FIRM, P.C.

709 HURON AVENUE
PORT HURON, MICHIGAN 48060

MATTHEW M. WALLACE, C.P.A., J.D.
BUZZ C. SUUPPI, J.D.

www.happylaw.com

TELEPHONE (810) 985-4320
FAX (810) 985-4108

Initial Appointment Checklist Urgent Estate Planning

IF MARRIED, PLEASE PROVIDE ALL INFORMATION FOR HUSBAND AND WIFE

1. Estate Planning Documents:
 - a. Include Financial and Health Care Powers of Attorney, Will(s), Codicil(s), Trust(s), Trust Amendment(s).
2. Full names, for prospective client(s) and:
 - a. Children
 - b. Will beneficiaries and personal representatives (if other than a. above)
 - c. Trust beneficiaries and successor trustees (if other than a. or b. above)
3. For the persons named in 2. above who are living, please include current address, home, work and cell phone numbers.
4. If any of the persons named in 2. above are deceased, please list person with his/her date of death.
5. Assets (individually, jointly and trust owned):
 - a. List of all real and personal property with approximate values and how owned/titled.
 - b. Include bank accounts, annuities, vehicles, CDs, IRAs, 401(k)s, real estate, cash value and death benefit of life insurance policies, pre-paid funerals, cemetery plots, stocks, bonds, investments, brokerage accounts, amounts loaned to others, etc.
6. Debts:
 - a. List of all debts and monies owed with approximate amounts owed.
 - b. Include mortgages, credit card debt, installment loans, vehicle loans, etc.