

# Hunsinger Law Group, LLC

Guiding Success, Protecting Futures  
(833) 256-6644 | [www.hunsingerlaw.com](http://www.hunsingerlaw.com)

## What to Bring to Your Estate Planning Consultation

A quick checklist to help you prepare for your first meeting

### Personal Information

- Government-issued photo ID
- Social Security numbers (yours & spouse's)
- Birth dates of all family members
- Marriage certificate (if applicable)
- Prenuptial/postnuptial agreement (if any)
- Divorce decree(s) from prior marriages

### Existing Legal Documents

- Current will or trust documents
- Power of attorney (financial and/or healthcare)
- Living will or advance directive
- HIPAA authorizations (if any)
- Beneficiary designation forms

### Financial & Property Records

- Recent bank & investment account statements
- Retirement account statements (401k, IRA, pension)
- Real estate deeds, titles, or mortgage statements
- Life insurance policies (company, type, benefit)
- Business ownership docs (operating agreements)
- Vehicle titles (cars, boats, etc.)
- Recent tax returns (last 2 years)

### Debts & Liabilities

- Mortgage information
- Student loan, auto loan, credit card balances
- Any pending lawsuits or legal matters

### Your Wishes — Think About These Ahead of Time

- Who should manage your affairs if you can't?
- Who should make medical decisions for you?
- Who should raise your minor children?
- Who should receive your assets?
- Any specific gifts (e.g., heirloom to a child)?
- Charitable giving goals?

### If You Own Property in Both States

- Deeds/titles for all MO & IL properties
- POA rules differ (MO: 2 witnesses; IL: notary)
- IL has a state estate tax; MO does not

### Digital Accounts & Access

- Online banking / investment login info
- Email and social media account list
- Cryptocurrency wallet info (if any)
- Password manager or key location

#### Don't worry if you can't find everything on this list.

Bring what you have — we'll work through the rest together. If you'd like help gathering documents before your appointment, call us at (833) 256-6644.