NORTON
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ESTATE PLANNING DOCUMENTS REQUIRED

Please bring the documents listed below to the initial conference (if they apply to you).

The following documents are required for estate planning purposes. If the client is married, all of these documents are needed for both spouses.

________ Current Estate Planning documents, i.e., Trusts, Wills, Powers of Attorney, etc.

________ Deed(s) to Real Property.

________ Bank Account Statements.

________ Brokerage Account Statements.

________ IRA Statements with Beneficiary Designations.

________ Life Insurance Policy Face Sheets with Beneficiary Designations.

________ Annuity Contracts with Beneficiary Designations.

________ Corporate / LLC Entity Documents (Articles, Bylaws, Operating Agreements).

________ Tax Returns (most current year).

________ Death Certificate for Deceased Spouse.

________ Prenuptial/Postnuptial Agreements.

________ Decree of Divorce – Property Settlement Agreements.