

## WHAT YOU PROVIDE . . . .

### INFORMATION NEEDED FOR ESTATE PLAN

#### Banks and Savings and Loans

\_\_\_ A copy of the statement for each bank and savings and loan account (preferred) or name, address, branch and account number of each bank and savings and loan account.

#### Credit Unions

\_\_\_ A copy of the statement for each credit union account (preferred) or name, address and account number of each credit union account.

#### Real Property

\_\_\_ Copies of your real property deed(s).

\_\_\_ Copies of your real property tax statement(s).

#### Investments

\_\_\_ Copies of recent statements for each investment.

\_\_\_ Copies of any ownership certificate for an investment (please bring originals to the signing appointment).

\_\_\_ Copies of any stock or ownership certificates in your possession (please bring originals to the signing appointment).

\_\_\_ Copies of any bearer or registered bonds (please bring originals to the signing appointment).

\_\_\_ Listing of any U.S. government bonds (amount and bond number).

#### Life Insurance

\_\_\_ Name of company, address, type of policy, name of owner, name of insured and policy number for each policy of life insurance.

\_\_\_ Original/Copy of life insurance policy.

Pension Plans, Annuities and Individual Retirement Accounts

\_\_\_ Copies of recent statements for each pension, annuity and Individual Retirement Account.

\_\_\_ Original/Copy of pension/annuity.