

ALLEY THEATRE

PREPARATION CHECKLIST FOR FIRST MEETING WITH AN ATTORNEY

In order to do the best possible job of drafting a will that can ensure accomplishment of your real objectives, your attorney must obtain from you a great deal of factual information.

Before making an appointment with your attorney to discuss the planning (or changing) of your will, it will be mutually helpful if you prepare a “fact sheet” containing the following kinds of information:

- Your name, Social Security number, birthday and birthplace.
- Spouse’s name, Social Security number, birthday and birthplace.
- Names and ages of children.
- Residential address. If more than one, list each. Which is your “voting address”? Which is your “income tax address”?
- Date and place of present marriage. Where can marriage license be found? Copy of prenuptial agreement (if any)?
- Names of former spouses now deceased. Have there been divorces? Where? Contested? By whom? Have there been separations? By court action? Agreement? Copy of separation (if any).
- Names, ages and addresses of closest relatives – and nature of relationships.
- Names, ages and addresses of persons you wish to make beneficiaries.
- Where are copies of your income tax and (if any) gift tax returns? Who prepared or helped prepare them? Name? Address? Do you have an accountant? Name? Address?
- Real estate owned. Individually or jointly? Estimated value? Cost basis? Mortgage?
- Total assets. Nature and estimated value of each? Cost basis?
- Total debts. To whom? Addresses? Nature of liabilities? When occurred?
- Your employer’s name and address. Name and address of your spouse’s employer.
- Do you or your spouse have stock-purchase plans? Stock options? Buy-sell agreements? Employment contracts? Pension or profit-sharing rights? Other employment benefits? How payable at death?
- Life insurance policies on your life? Spouse’s life? Which owned by you? By others? Annuity policies? Owned by you? Each policy number, principal amount, beneficiary, loan against, insurance company name and address, etc.
- Have you established a trust? Are you the beneficiary of a trust? Have copy of trust agreement? Power of appointment under any will or trust? Have a copy of the document?

Such a “fact sheet” should be regularly updated. Place a date on each. There should be copies not only for your attorney but also your executor, trustee, spouse and perhaps some relatives.

Checklist courtesy of R&R Newkirk. This information is for illustration purposes only. The Alley Theatre strongly suggests that you consult your own legal, tax or financial advisor as to the applicability of any item to your own situation.