Life Planning Group, LLC

Pre-Meeting Checklist

Greetings!

In preparation for our meeting, please identify the people you trust to serve in these roles along with their addresses and phone #s. It's best to have one or two alternatives in case your first choice(s) cannot serve.

- **Successor Trustees** – people you trust to manage and distribute your trust estate upon your incapacity or death
- **Personal Representative** – a.k.a. the 'executor' of your Will – works with the Trustee to 'pour over' any forgotten assets into your Trust and is often the same person(s) serving as successor Trustee(s) of your Trust
- **Financial Power of Attorney** – people you trust to make financial decisions for you if you become mentally or physically incapacitated - children or other trusted adults
- **Medical Power of Attorney** – people you trust to make medical decisions for you if you become mentally or physically incapacitated - children or other trusted adults
- **Guardians for Minor Children** – people you trust to serve as guardians for yourself or your minor children, if any - often someone other than the Trustee, separating the financial management and child-raising responsibilities

Other things to think about:

- What age or ages do you want your children to attain before they receive outright control over their inheritance? NOTE: They will have everything they need for their health, education and welfare right up to the age(s) of outright distribution
  How will your children's shares be distributed if they do not survive you, i.e. to their children (your grandchildren), but if they have none, to your surviving children?

Please bring the following documents with you:

- Copies of deeds for all real estate that you own, including primary and secondary residences, rental properties, raw land and timeshares
- Corporate documentation, i.e. Company Record Books
- Copies of statements for your checking, savings, money market, CDs, brokerage, investment, retirement plans and life insurance policies

NOTE: If you don't have everything together for our first meeting, don't worry! Your 'Trust Data Summary' will reflect everything we've discussed and includes a 'To Do' list. You'll have plenty of time to ask questions, make changes and fill in the gaps.

Putting an estate plan together requires some time and thought, but the rewards are well worth it, and we'll make it as easy as possible. Look forward to seeing you soon!

All the best,

Warner Lewis III
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