

WHAT TO BRING...

Initial Estate Planning Meeting

- Prior Documents** – If you have prior estate planning documents (Will, Trust, Powers of Attorney, Health Care Representative Appointments, Living Wills), please bring those with you.
- Bank and Investment Accounts** – Either current statements from all banks, investment accounts, retirement accounts, life insurance policies, or a list of all such accounts.
- Beneficiary Information** – Information on any beneficiary designations/transfer on death designations on any bank, investment accounts, retirements accounts, life insurance policies.
- Name List** – List of full legal names, relationships, and addresses of anyone who will be an heir, or that you are considering appointing as a representative, such as an Executor, Power of Attorney, Health Care Representative, etc. Also, date of birth for anyone who is under 18.
- Things to Consider: Heirs** – Who will be your heirs? It is best to think about percentages when considering multiple people.
- Things to Consider: Executor** – Who do you want to appoint to be in charge of settling your affairs? (Executor)
- Things to Consider: Medical decision-maker** – Who do you want to make medical decisions for you in the event of a serious accident or illness?
- Things to Consider: Financial decision-maker** – Who do you want to handle financial and business matters for you in the event of a serious accident or illness?

WHAT TO BRING...

Initial Medicaid/Nursing Home Asset Protection Meeting

- Bank** – Bank statements for all accounts from the past 6 months (all pages, even if blank); Current balances in all bank accounts.
- Investments** – Investment/financial account statements for all accounts for the past 3 months, all pages. (This includes stocks, bonds, mutual funds, CDs, retirement accounts, annuities, etc.).
- Income** – Documentation of all income (This includes paystubs, pension statements, Social Security annual benefit amount letter, annuity payments, business or rental income, etc.).
- Real Estate** – The Deed and/or property tax statement or assessment for any real estate owned.
- Vehicles** – Titles and/or registrations for any cars, truck, motorcycles, RVs, trailers, and other titled motor vehicles.
- Life Insurance** – The actual policy for any life insurance owned and a statement of current cash surrender value, if it has a surrender value. If it does not, something in writing stating this. You may need to contact the life insurance company to obtain this information in writing.
- Long-Term Care Insurance** – Long-Term Care insurance (nursing home insurance), if you have this kind of insurance, bring in the actual policy and any other information you have about this insurance.
- Pre-Paid Funeral** – The policy/contract for any prepaid funeral arrangements.

WHAT TO BRING...

Initial Medicaid/Nursing Home Asset Protection Meeting

- Legal Documents** – All legal documents (This would include Powers of Attorney, Healthcare Representative Appointment, Last Will and Testament, Trusts, etc.).
- Gifts** – Have you made any large gifts (\$1000 or over) in the past 5 years, or given away any interest in real estate? Vehicles? If so, documentation of those gifts (dates and amounts).
- Sales** – Information on any large assets that you have sold - such as real estate or vehicles, in the last 5 years.
- Closures** – Information on any bank accounts or investment accounts that you have closed or moved in the last 5 years.
- Medicaid Admission Dates** – Please know the date of any recent hospital admissions and/or nursing home/rehab admissions.
- Bills and Debts** – Information on regular monthly bills and outstanding debts, such as mortgage balance, credit cards, large outstanding medical bills and other large debts.
- Taxes** – If filing income taxes, most recent tax return and all 1099s/other attachments.

WHAT TO BRING...

Initial Asset Protection Meeting

For those who might be worried about future nursing home/asset protections, but no current need

- Bank** – Recent bank statements (all pages) for all accounts.
- Investments** – Investment/financial account statements for all accounts (all pages). (This includes stocks, bonds, mutual funds, CDs, retirement accounts, annuities, etc.).
- Income** – Information on all income you receive.
- Real Estate** – The Deed and/or property tax statement or assessment for any real estate owned.
- Life Insurance** – Information on any life insurance policies that you may have, including current cash surrender value and death benefit.
- Long-Term Care Insurance** – Long-Term Care insurance (nursing home insurance), if you have this kind of insurance, bring in the actual policy and any other information you have about this insurance.
- Legal Documents** – All legal documents (This would include Powers of Attorney, Healthcare Representative Appointment, Last Will and Testament, Trusts, etc.)
- Gifts** – Have you made any large gifts (\$5000 or over) in the past 5 years, or given away any interest in real estate? Vehicles? If so, documentation of those gifts (dates and amounts).
- Debts** – Information on outstanding debts, such as mortgage balance, credit cards, large outstanding medical bills and other large debts.
- Taxes** – If filing income taxes, most recent tax return and all 1099s/other attachments.

WHAT TO BRING...

Initial Asset Protection Meeting

If you want to talk about your home/real estate

- A copy of the deed to your house. You should have a copy of your deed, even if you have a mortgage. You should have received a copy at the time of original purchase, and it should be located in the packet of documents you received at the time of closing. *If you do not have a copy of the deed, you can obtain it from the Recorder's Office of the county in which the real estate is located.*
- If you have a mortgage and/or home equity loan on your house, a recent mortgage statement
- A recent property tax statement or assessment for all parcels of real estate that you own
- If you have done anything that would change the original boundaries/legal description of your real estate, please bring information on that change. *For example, if you gave a piece of real estate to a family member, bring a copy of that deed. Or if the state or county took a piece through an eminent domain process, please bring any paperwork associated with that.*
- If any owners of the property have passed away and their name(s) are still on the property, please bring a copy of the deceased owner's death certificate.
- If you are considering putting someone else's name on the property, please have that person's full legal name and current address.
- Your current legal documents, such as Trust, Will, Power of Attorney, etc.

WHAT TO BRING...

Meeting After a Loved One's Death

- Original death certificate
- All legal documents – Will/Trust/Amendments, etc. **Make sure you have signed original version**
- Recent statements for all bank, investment and retirement accounts
- Life insurance information
- Information on any other financial accounts
- Please find out if there are any joint owners, beneficiaries or transfer on death designations for any of the accounts
- List of people who are named as heirs or beneficiaries (full legal names and current addresses)
- For any real estate owned, the deed and recent property tax statement, along with information on any mortgage or home equity loans
- Information on any other assets owned by the deceased person (vehicles, etc)
- Information on all possible outstanding debts
- Most recent income tax return (1040) and all attachments (W-2s, 1099s, etc.)

(Last Updated: 4/20/2026)