ECKERT BYRNE LLC
A LIFE AND LEGACY PLANNING LAW FIRM

WHAT TO EXPECT & BRING TO YOUR INITIAL CONSULTATION

Our firm philosophy is to provide a caring and holistic approach to estate and legacy planning. Our initial meeting is designed to provide you with an educational overview of how estate planning works, the types of documents we use, and why we use them. We request that you come to the meeting prepared by completing the Personal Information Form.

Our comprehensive and holistic approach means we have to know what is most important to you, what your main concerns are, and what you own before we can make recommendations. We have found that our consultations are more productive when clients come prepared to the meeting.

Additionally, in order for us to make estate planning recommendations, it is necessary for us to review your other documents before we can make specific recommendations. Please provide the following documentation prior to the initial consultation, with the **personal information form**, so we can discuss these documents. We need to receive these in paper form or in via secure share file*. If we do not receive the personal information form by the initial consultation, we will ask you to spend the beginning of the meeting completing it which will limit your time with the attorney.

- ☐ Copies of existing estate planning documents, including wills, trusts, powers of attorney, health care directives, etc.
- ☐ Copies of all deeds to real estate owned by you.
- ☐ Copies of the most recent statements evidencing your ownership of bank accounts, investment accounts, retirement accounts, and annuities.
- ☐ Copies of any stock or bond certificates (if any).
- ☐ Life insurance policies (if any).
- ☐ Pre or Postnuptial Agreement (if any).
- ☐ Long-term care policies (if any).
- ☐ Divorce Decree or Property Settlement Agreement for divorce under which continued obligations exist.
- ☐ Last 2 years of personal income tax returns.
- ☐ Last 2 years of any corporate, partnership, gift tax, estate tax, or trust tax returns.

*** Please do not hesitate to reach out to Chase regarding setting up your secure share file account - it's easy & provided at no additional cost to you! Chase can be reached at 617-453-9001 or via email chase@eckertbyrne.com and will be happy to answer any questions you may have.**