# Preparing for The Estate Planning Consultation

No special preparation is required for this meeting. Attorney McManus will walk you through the entire process. However, many clients will ask what they should bring or what they should do to prepare for this appointment. Therefore, please consider the following list to ensure your meeting is the most productive it can be.

- Married couples must attend the estate planning consultation together. If you cannot both attend your scheduled meeting, we kindly ask that you reschedule to a time when you both can be there. If a spouse comes alone, the meeting will be cancelled.
- Put some thought into who you would want to have control over your financial, legal, and medical decisions if you were to become disabled or pass away.
- Think about who you would want to inherit your assets if you were to pass away. When would you want them to inherit them, all at once or over time?
- Collect names and dates of birth of individuals you would like to include in your plan. Social security numbers are not necessary.
- If you have minor children, who would you like to care for them if you cannot?
- Although beneficial, it is not necessary to bring a list of assets, account statements or investment reports. However, it is important to be aware of the approximate balances of your holdings and the beneficiary designations if any.

If you need further information prior to your estate planning consultation, please contact the office at 508-927-4801 or visit our website at PlymouthEstatePlanning.com.

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