

Estate & Trust Planning / Long Term Care

Meeting Instructions

Appointment Date: / / _____

Appointment Time: _____

Meeting with: _____

This list has been prepared to assist you in planning for your upcoming meeting. To view, download, or print additional materials listed herein, please consult the “Meeting Instructions & Forms” page under the “Links and Forms” tab on our website at www.hhelderlaw.com. Alternatively, please feel free to contact a member of our staff at (317) 787-8395 and we will gladly mail, e-mail, or fax a packet to you.

- 1) Please prepare a current listing of your assets using our “Asset Listing” form, or similar spreadsheet.
- 2) Please bring any existing estate planning documents for you and your spouse:
Generally, the term estate planning instruments can include the following:
 - Last Will & Testament
 - Power of Attorney
 - Living Will / Health Care Declaration
 - Trust Instrument
 - HIPAA Authorization
- 3) Please compile a list of the name, address, telephone, and e-mail contact information for any individual(s) and/or organization(s) who should inherit a share of your estate, serve as guardian of a minor child (if applicable), or serve as one of your fiduciaries or agents.
- 4) Please prepare and bring a list of any questions you may have.

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