HOLWAGER & HOLWAGER
ATTORNEYS AT LAW, P.C.

Instructions for Initial Estate and/or Trust Planning Meeting

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These instructions will assist you in planning for your upcoming meeting. To view, download, or print additional materials listed herein, please consult the "Resources" page 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.

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1. Please prepare a comprehensive listing of your current assets with our "Asset Listing" form, or similar spreadsheet. For each asset, be sure to specify the:
   a. Asset Type (Real Estate / Banking / Investing / Life Insurance / Vehicle / etc.)
   b. Value (expressed in even thousands is sufficient)
   c. Tax Status (Roth IRA / Traditional IRA / etc.) and basis (as applicable)
   d. Owner(s) (Sole Name, Joint, Pay/Transfer-on-death (POD / TOD), beneficiary designation, etc.)

2. Please bring any existing estate planning documents for you (and your spouse, as appropriate). Generally, the term estate planning instruments can include the following:
   - Last Will & Testament ("Will")
   - Trust Instrument
   - Power of Attorney
   - HIPAA Authorization
   - Living Will / Health Care Declaration / Health Care Power of Attorney

3. Please compile a list of the 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 (agents) to make personal, financial, legal, and/or medical decisions on your behalf if needed. For each individual (or organization) please provide (as applicable) their:
   a. Full Name (as it should appear in your document),
   b. Address,
   c. Telephone #,
   d. E-mail Address, and
   e. Date of Birth

4. Please prepare and bring a list of any questions you may have.

5. Your upcoming appointment is:

Appointment Date: _____ / _____ / _____ Appointment Time: _____

Meeting with: _____

1818 Main Street, Beech Grove, Indiana 46107
TEL: (317) 787-8395 / FAX: (317) 787-1231
www.hhelderlaw.com