

*Please complete these tasks and bring the requested material to your next meeting. To access additional materials referenced herein, consult the “Resources” page online at [hhelderlaw.com](http://hhelderlaw.com)*

*Alternatively, contact a firm team member at 317-787-8395 or [intake@hhelderlaw.com](mailto:intake@hhelderlaw.com) for assistance.*

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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 specify:
  - a. What is the asset? (real estate / time share / banking / investing [stocks, bonds, mutual funds, IRAs, 529 plans, annuity, etc.] / life insurance / vehicle / boat – RV / business interest / something else)
  - b. Who is the custodian? (bank / investment firm / etc.)
  - c. How is the asset titled?
    - i. Who is the owner? (one person / jointly held with others / etc.)
    - ii. Does the asset have a pay-on-death (POD) beneficiary designation? If so, who is / are the beneficiary(ies)?
  - d. What is the asset’s present value? (expressed in even thousands is sufficient)
  - e. What is the asset’s Tax Status? (Roth IRA / Traditional IRA / etc.)
  - f. Provide basis (acquisition) value as applicable / available.
2. Bring documentation as to each asset as available. For example:
  - a. Deed to real estate / timeshare (include a current mortgage statement as applicable)
  - b. Current bank / investment account statement for each financial account / holding
  - c. Report of present death benefit and cash surrender value for each life insurance policy
  - d. Vehicle title(s)
3. Bring a copy of your most recently filed federal and state income tax return.
4. Bring any existing estate planning documents for you (and your spouse, as appropriate). Generally, the term estate planning instruments can include:
  - a. Last Will & Testament (“Will”)
  - b. Trust
  - c. Power of Attorney (POA)
  - d. Appointment of a Health Care Representative (Health Care POA / Living Will / etc.)
  - e. HIPAA Authorization

5. Prepare a list of the individual(s) and/or organization(s) who should:
  - a. Inherit when you pass away,
  - b. Serve as guardian of a minor child (if applicable), or
  - c. Serve as one of your fiduciaries (agents) to:
    - i. wind-up your final affairs,
    - ii. make personal, financial, legal, and/or medical decisions on your behalf as needed,
    - iii. have access to your medical records,
6. For each party considered to serve in one or more of the above roles, please provide (as applicable) their:
  - a. Full Name (as it should appear in your document),
  - b. Date of Birth
  - c. Current telephone #
  - d. Current physical (and mailing if different) address
  - e. Current e-mail address
7. Please prepare / bring a list of your questions and/or specific points you want to discuss.
8. The details for your upcoming appointment are as follows:

Appointment Date:        /        /

Appointment Time: \_\_\_\_\_

You are scheduled to meet with Attorney: (*Check applicable box*)

☐ **William J. Holwager**

☐ **Mark W. Holwager**

☐ **Ryan T. Hendershott**

☐ **Julie E. Downey**

*To change your appointment, or to address urgent questions / concerns in the interim, contact our office.*

**WEB:**            hhelderlaw.com

**TEL:**            (317) 787-8395

**E-MAIL:**        [intake@hhelderlaw.com](mailto:intake@hhelderlaw.com)

**PLEASE TAKE NOTE:**

- Do not transmit materials to our office in advance unless specifically requested.
- HHPC is not responsible for your transmission of confidential material in a non-secure format. (i.e. by unencrypted e-mail).
- Your receipt of this instruction does not create an attorney-client relationship.

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