

Preparing to meet with a lawyer regarding your will

To speed the will drafting process along, it is a good idea to prepare to meet with an attorney. Here are a few things you will want to consider:

- ⊖ Prepare an inventory of your assets, outstanding debts and creditors, and an estimate of our total assets' value. These lists and numbers can have a tax consequence and must be taken into account in preparing estate planning documents.
- ⊖ Bring any items necessary to prove your authority if you are contacting the attorney on behalf of someone else. For example, if you are a son or daughter contacting and meeting with an attorney on behalf of your elderly parents, then you'll need to bring documentation authorizing this activity (such as a Power of Attorney).
- ⊖ Make sure you have all the pertinent addresses, social security numbers and legal names for:
 - Beneficiaries of the will (people who will get the assets),
 - Guardians for any children (you will want to talk with them prior to naming them guardian), and
 - Executor.

Also, make sure to have alternates for the beneficiaries, guardians and executors in case they die before you or are unable or unwilling to serve.

- ⊖ Make a list of specific items (family heirlooms, etc.) and the people who will be receiving those items under a will. A list made prior to the meeting can cut down on revisions and make sure that all the provisions are included in the first draft of the will.
- ⊖ Many attorneys will send you a questionnaire prior to the initial meeting to help with the information gathering process. Make sure to fill it out as completely as possible and bring any documents requested.
- ⊖ Some of the items that may be requested (and that you should bring to the initial meeting) include copies of:
 - Wills or trusts;
 - Deeds to all real property;
 - Life insurance policies;

- Prior gift tax returns, if any; and
 - Trust agreements in which the person is a donor or beneficiary;
- ø Finally, prepare a list of questions for the attorney. It is easier have all your questions answered at once then to try and call the attorney as the questions come to you. Some questions you might wish to ask:
- How long will the document preparation take?
 - What are the legal issues with the estate?
 - If I have a question, will you answer it without charging for the call or is it a separate fee?
 - What is the best way to contact the attorney (email, phone, fax or mail)?

A little preparation on your behalf can save you attorney's fees and speed the entire process along.

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