

# 6 Things to Have on Your First Visit with Your Estate Planning Attorney

**By Matthew Crider, JD  
Family Wealth Protection Attorney**

Your first meeting with an estate planning attorney can be daunting. Nobody really enjoys talking about their own death with a complete stranger, and many people mistakenly believe it will be sad or difficult. But creating your estate plan isn't about your death—it's about your life. In fact, the very first things you will discuss with your estate planner are the things that are most important to you, the issues that will be at the heart of your estate plan: Your family, your assets, and your goals.

If you want to get the most out of this first visit it helps to be prepared. Of course, every firm will be a bit different, but here are a few universal tips on how to be prepared and get the most out of your first visit to an estate planning attorney.

**Have your financial statements.** A large part of what an estate planning attorney does is to help you protect your assets. In order to do this, she needs to know what assets there are and what your general financial situation is. Having actual numbers, rather than vague ideas, is a huge help.

**Know how the deed to your home is held.** For most people, their home is their largest asset. How title is held, and in what the state of ownership, will have a large part in deciding what your best course of action will be.

**Have some preliminary thoughts about who you may to be your executor and health care agent.** This may change once you know more about what these roles entail, but having one or two people as a starting point will speed the process considerably.

**Bring contact information for financial advisors with whom you work on a regular basis.** Having your attorney work directly with your financial advisors, if any, is integral to having an airtight estate plan and financial plan. Not to mention that it makes things much easier on you to not have to act as a go-between.

**If you're married, or planning with a partner, come to the meeting together.** Planning as a couple really needs to be done as a couple. "I'll have to talk it over with my partner" only means you're likely to have to have the same meeting all over again. If you'll both be signing documents, you both should be there for the initial meeting.

**Bring a list of questions to ask the attorney.** Even if you only have one or two, and you think they're naïve, bring your list of questions. Your questions tell an attorney a lot about what your goals are, and will help you get a good read on what the attorney is like as a person and professional.

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## About Matthew Crider, J.D.

Matthew Crider formed [Crider Law PC](#) in 1999 so he could help individuals and business owners by providing creative solutions and be their trusted advisor and legal counselor. He serves his clients by listening closely to their goals, dreams and concerns and working with them to develop superior and comprehensive estate and asset protection plans. His estate planning practice focuses on preserving and growing wealth by providing comprehensive, highly personalized estate planning counsel to couples, families, individuals and businesses.

