

## Document Checklist

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

Please return this form with the information indicated below:

- Copy of your present Will.
- Copies of deeds to all real estate in which you own an interest.
- All insurance policies owned by you together with those policies on your life which are owned by others.
- Copies of all documents relating to pension, profit sharing, deferred compensation and other employee benefit plans.
- Copies of all buy-sell or stock transfer restriction agreements to which you are a party.
- Copies of all Trust Agreements of which you are a beneficiary.
- Copies of all Trust Agreements executed by you.
- Copies of all Powers of Attorney executed by you.
- Copies of all divorce decrees and any modifications thereof.
- Copies of all pre-nuptial or post-nuptial agreements.
- Copies of all gift tax returns previously filed by you.
- Copies of last three years Income Tax Returns, including depreciation schedules.
- Copies of all mortgages on your real estate.