

EXHIBIT "A": GUARDIANSHIP - ADULTS

PLEASE BRING THE FOLLOWING DOCUMENTS WITH YOU AND WE WILL COPY THEM HERE DURING YOUR APPOINTMENT:

- 1. LAST WILL & TESTAMENT; CODICIL TO THE WILL.**
- 2. SEPARATE WRITTEN LIST OF TANGIBLE DEVISES.**
- 3. TRUST AGREEMENT; TRUST AMENDMENTS.**
- 4. CERTIFIED COPY OF SPOUSE'S DEATH CERTIFICATE.**
- 5. PROOF OF PUBLIC ASSISTANCE (I.E. MEDICAID).**
- 6. DEED, CURRENT TAX BILL AND HOMEOWNER'S INSURANCE BILL FOR HOME AND ANY OTHER REAL ESTATE YOU OWN.**
- 7. CAR TITLE/VEHICLE REGISTRATION, INSURANCE POLICY AND BILL FOR ALL AUTOMOBILES IN WHICH YOU HAVE AN INTEREST.**
- 8. STOCK CERTIFICATES OR RECENT STOCK STATEMENTS FOR STOCKS IN WHICH YOU HAVE AN INTEREST.**
- 9. MORTGAGE PAPERS.**
- 10. RECENT BANK STATEMENTS FOR ALL BANK ACCOUNTS, IRA'S AND CERTIFICATES OF DEPOSIT IN WHICH YOU HAVE AN INTEREST.**
- 11. LIFE INSURANCE POLICIES IN WHICH YOU ARE THE OWNER OR NAMED INSURED.**
- 12. ANNUITY CONTRACTS, RETIREMENT AND PENSION PLANS.**
- 13. DOCUMENTS EVIDENCING OTHER TYPES OF INVESTMENTS IN WHICH YOU HAVE AN INTEREST.**
- 14. DURABLE POWER OF ATTORNEY.**
- 15. LIVING WILL OR MEDICAL ADVANCE DIRECTIVE.**
- 16. DESIGNATION OF HEALTH CARE SURROGATE.**
- 17. LIVING/REVOCABLE TRUST.**
- 18. PRE OR POST NUPTIAL AGREEMENT.**
- 19. COPIES OF HEALTH INSURANCE INFORMATION INCLUDING THE COST.**
- 20. DOCUMENTATION ON MONTHLY EXPENSES.**
- 21. STATEMENT FROM SOCIAL SECURITY IDENTIFYING THE TYPE OF BENEFITS (RETIREMENT; SURVIVORS; SSI; SSDI) AND AMOUNT.**

