

EXHIBIT "A"
ESTATE AND HEALTH CARE PLANNING

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

1. Your Last Will and Testament.
2. Your Codicil to the Will.
3. Your separate written list of Tangible Devises.
4. Certified Copy of Spouse's Death Certificate.
5. Your Trust Agreement.
6. Deed and Current Tax Bill for home and any *other* Real Estate you own.
7. Car Title/Vehicle Registration and Insurance Policy 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.

If you own a BUSINESS, please bring the following:

19. Proof of Incorporation.
20. Proof of Tax Status (i.e. S-Corp; C-Corp.).
21. Buy/Sell Agreement.
22. Deed to Real Estate Owned by the Business.
23. Insurance Policies.