

# HOW TO PREPARE

## for meeting with your estate planning attorney

Whether you are meeting with an attorney to discuss your first will or trust or to revise your existing estate plan, there are some ways you can begin to prepare for your meeting today. Please contact us to request a free Estate Planning Guide.

- ✓ Write down a list of questions you have for your attorney. Thinking through your needs and goals in advance helps to ensure that the meeting with your attorney is efficient and effective.
- ✓ Review our website for planning ideas. Learn about the ways you can provide for your family, create gifts of income, save on taxes and benefit our organization with your plan.
- ✓ Gather and organize your information. Complete our FREE Estate Planning Guide or use the Wills Planner available on our website to gather information about your family, assets and goals.



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