FARR LAW GROUP PLLC

YOUR ESTATE PLANNING APPOINTMENT

Whether you are a new client or we have previously prepared estate planning documents for you, please bring the following items to your estate planning appointment:

1. Any and all estate planning documents (Wills, Powers of Attorney, Directives, Community Property Agreement, Trusts, etc.) you currently have;

2. A list of your assets (real estate, financial accounts, life insurance policies, retirement accounts), where they are located, and their current approximate value;

3. A list of the sources and monthly value of your current income;

4. A list of the sources and approximate monthly value of your retirement income, if you are not already retired; and

5. Begin thinking of whom you would like to name as your attorney in-Fact, Executor, and Guardian of your minor children (if applicable). For any person you would like to name in a document please have the correct spelling of their full legal name.

Our approach to your estate plan will depend on facts concerning the size and nature of your estate and your family. For example, we do not need to address estate taxes unless your estate is worth more than $2 million.

Please be prepared to discuss details about your children (their names, marital status, children they have, whether they are financially independent), and any special concerns you have for them.

Finally, our physical location is 1110 Stevenson Avenue, Suite 100, Enumclaw, WA.