

# PLAN AHEAD FOR YOUR APPOINTMENT



## WE CAN'T WAIT TO MEET YOU!

### PREPARING FOR YOUR VISIT

In preparation for your planning appointment, please bring the following information (or as much as possible) with you to your meeting:

- Spouse** - if you are married, please make sure you both attend the appointment
- Confidential Client Data Sheet** - please complete up to page 5, and bring it with you
- Existing Wills/Trusts** - bring any existing estate planning documents
- Copy of Deeds** - if you own real property, please bring a copy of the deeds
- Corporate Books** - if you own a business, please bring in your corporate records

Please feel free to bring in anything else that you think is important for your planning meeting, such as: divorce decree, copies of investment or retirement account statements, life insurance policies, etc...



### THE ADVANCEMENT GROUP

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