The Kingsley Group

ESTATE PLANNING INTAKE APPOINTMENT

Preparation Checklist

1. Personal & Family Information

- Full legal name (as shown on ID), for yourself and spouse (if applicable)
- Date of birth and place of birth
- Current marital status, Prior marriages (dates of marriage, divorce, or widowed)
- Children:
    - Full legal names , Dates of birth (biological, step, natural, disabilities)

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2. Fiduciaries & Key Decision-Makers

Prepare **full legal names, addresses, phone numbers, and emails** for:

- Primary Trustee & Successor Trustee(s)
- Executor / Personal Representative (Primary and Secondary)
- Agent for Healthcare Power of Attorney (Primary and Secondary)
- Agent for Financial Power of Attorney (Primary and Secondary)
- Guardian for minor children (if applicable)

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3. Asset Inventory

Real Property

- Primary residence (address, how title is held)
- Rental or investment property
- Out-of-state property, Timeshare, etc..

Financial Accounts

- Bank Accounts
- Investment Accounts, Retirement Accounts (401(k), IRA, Roth IRA), Pensions, Annuities

Business Interests

- LLCs, Corporations, Partnerships, Professional practices

Life Insurance

- Policy type (Owner vs. insured vs. beneficiary, face value)

Personal Property

- Vehicles, Jewelry, Artwork, Firearms, Collectibles

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4. Existing Estate Planning Documents

Bring copies of any existing estate planning documents you may have, including Prenuptial or Postnuptial Agreements

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5. Distribution & Inheritance Wishes

- Who inherits each specific asset?; Percentages or specific gifts; Contingent beneficiaries
- Age-based distributions for minors, Staggered or discretionary distributions

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6. Minor Children Planning (If Applicable)

- Primary guardian, Alternate guardian(s)
- Trust provisions for minors, Educational funding preferences
- Religious or cultural instructions

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7. Healthcare & Incapacity Planning

- End-of-life choice, Life-prolonging treatment choices, life support, resuscitation choice
- Organ donation wishes

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8. Final Wishes

- Burial or cremation preferences
- Pre-need funeral arrangements
- Instructions for remains
- Ethical or religious directives
- Personal letters or legacy messages

Optional: Bring to the Appointment if available

- Photo ID
- Marriage certificate
- Divorce decrees
- Deeds
- Account statements
- Business operating agreements
- Insurance declarations