



New Client

Paperwork



Preparing for your Initial Consultation – Estate Planning

If possible, please bring in copies of the following:

- (1) Any current estate planning documents (Wills, Trusts, Powers of Attorney, or similar documents).
- (2) Any prenuptial, postnuptial, cohabitation, or domestic partnership agreement.
- (3) A list of your assets and debts. Make sure you include (a) any inheritance you anticipate receiving; and (b) any interest you have in a trust. Don't worry about having exact numbers – rough estimates are just fine.

Please consider the following:

- (1) If you have minor children and a guardian must be appointed to care for them, who would you want to serve as their guardian? Who would you want to serve as an alternate guardian?
- (2) If you were in a serious car accident and were unable to make decisions regarding your finances, who would you want to make these decisions for you? Who would you want to serve as an alternate agent?
- (3) If you were in a serious car accident and were unable to make decisions regarding your health care, who would you want to make these decisions for you? Who would you want to serve as an alternate health care representative?
- (4) If you passed away, who would you want to serve as the point-person (i.e., personal representative or executor) in carrying out your wishes? Who would you want to serve as an alternate personal representative?

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If A Loved One has Passed Away

To prepare for your initial consultation after a loved one has passed away, please bring in copies of the following, if possible:

- (1) Any current estate planning documents (Will and/or Trust) and death certificate, if available.
- (2) A list of the decedent's assets and debts. Don't worry about having exact numbers – rough estimates are just fine. Please indicate how each asset was owned (i.e., was the asset owned by a trust or was it in the decedent's name? Was the asset owned with the decedent and another person?)
- (3) Any prenuptial, postnuptial, cohabitation, or domestic partnership agreement.
- (4) Contact information and names for the decedent's spouse and children.
- (5) Contact information and names of people inheriting from the decedent, regardless of whether the person is a Trust beneficiary or receives assets under the terms of the Will.
- (6) Contact information for the decedent's accountant, financial advisor, and insurance agent.
- (7) A list of any concerns and questions regarding the estate administration process (i.e., probate questions, creditor questions, timeframes, costs, tax concerns, etc.).

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