



Andrea L. Jakob, PA
The JakobLegal Team

ITEMS TO BRING TO MEETING

1. Any previous estate planning documents you may have.
2. Any Health Care Directives or Powers of Attorney.
3. Your calendar.
4. Your checkbook.
5. Deeds
6. Financial Statements
7. Business or Partnership Agreement
8. Any instrument or document that you believe may be relevant to your plan.