

ESTATE AND TRUST LAW, PROFESSIONAL LAW CORPORATION

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DOCUMENTS TO BE FURNISHED BY CLIENT

Please bring any of the following documents that apply to you to your initial interview:

1. Grant Deed(s), Quit Claim Deeds, Warranty Deeds showing legal description to your home and/or other real property owned by you or your spouse (NOT Deed of Trust). Please bring property tax statement;
2. Recent statement or cover sheet from bank(s), savings and loans and savings certificates held by you and or your spouse;
3. Corporate stock certificates and/or bonds;
4. Recent statement(s) from investment broker(s);
5. Copy of any pension or retirement programs, or employment related investment programs in which you or your spouse may be involved;
6. Life insurance policies with statements of loans against same;
7. Partnership agreements for any partnerships in which you or your spouse may be involved;
8. Corporate documents, by-laws, etc., for any corporation in which you or your spouse may be involved as an officer;
9. Copy of current trust, will(s), durable powers of attorney, living will(s);
10. Copy of any Marital property or Pre-Nuptial agreements signed by you and your spouse;
11. Copy of any other relevant agreements or any other information that will help establish.

All of your documents will be returned to you at the conclusion of your initial interview.