

Preparing for your Initial Consultation – Estate Planning

HERE ARE SOME THINGS YOU CAN DO TO PREPARE FOR YOUR INITIAL CONSULTATION WITH A GEVURTZ MENASHE ESTATE PLANNING ATTORNEY:

1. Bring copies of any current estate planning documents you have.
2. If applicable, bring a copy of any prenuptial, postnuptial, cohabitation, or domestic partnership agreement.
3. Prepare a list of assets (if married, designate whether each asset is held jointly or separately).
4. Prepare a list of debts (if married, designate whether each asset is held jointly or separately).
5. Bring any type of statement of net worth or financial statement, if you have one. Please be sure to include all retirement assets and life insurance policies.
6. On your statement of net worth, identify: (a) any significant inheritance you anticipate receiving; (b) any interest you currently have as a beneficiary in any trust.
7. Prepare a list of your concerns and questions about your estate plan. Here are some examples of questions many clients have during their consultation:
 - What percentage of your practice is devoted to estate planning?
 - What happens to my estate if I do not have a will?
 - What is a revocable trust?
 - What is probate?
 - How will my estate be affected by estate and income taxes?
 - How much can I gift each year?

- How can I provide for beneficiaries who are minors or who have special needs?
- How can I appoint someone to make decisions for me regarding my medical treatment?
- How often do I need to update my estate plan?
- Will anyone else be working on my case?
- How are your hours billed?

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Preparing for your Initial Consultation – Estate & Trust

HERE ARE SOME THINGS YOU CAN DO TO PREPARE FOR YOUR INITIAL CONSULTATION WITH A GEVURTZ MENASHE TRUST & ESTATE ATTORNEY:

1. Bring copies of the decedent's estate planning documents and death certificate, if available.
2. Prepare a list of assets owned by the decedent, and indicate how each asset was owned (jointly, individually, in trust, etc.) and the approximate value of each. Please also include a list of all known debts of the decedent. We understand that this information may be difficult to obtain, so do not worry about providing a complete list at this time.
3. Prepare a list of the decedent's spouse and children and their current addresses.
4. Prepare a list of the decedent's beneficiaries (those who have been named in the decedent's estate planning documents) and their current addresses.
5. Bring contact information for the decedent's accountant, financial advisor, and insurance agent.
6. Prepare a list of your concerns and questions about the probate/trust administration process. Here are some examples of questions many clients have during their consultation:
 - What percentage of your practice is devoted estate and trust administration?
 - The decedent died without a will – how does that affect administration of the estate?
 - How will the estate be affected by estate and income taxes?
 - How may I act on behalf of the decedent?
 - What happens if there are claims against the estate/trust?
 - How long does administration of the estate/trust take?

- Am I entitled to compensation for serving as personal representative/trustee?
- Will anyone else be working on my case?
- How are your hours billed?

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