



## **Renard Law Office LLC**

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### **WHAT TO BRING TO AN OFFICE CONFERENCE**

1. COMPLETED CLIENT INFORMATION SHEET FROM WEBSITE "CLIENT FORMS"
2. EXISTING ESTATE PLANNING DOCUMENTS (WILL, TRUST, POWERS OF ATTORNEY HEALTH CARE AND FINANCE, LIVING WILL, ETC.)
3. NAMES, ADDRESSES AND PHONE NUMBERS FOR THE PERSONS YOU WISH TO BE DESIGNATED ON YOUR FINANCIAL AND HEALTH CARE POWERS OF ATTORNEY
4. WARRANTY DEED, CONDO DEED, TITLE INSURANCE POLICY, OR SATISFACTION OF MORTGAGE FOR ANY PROPERTIES YOU OWN
5. VACANT LAND OR VACATION HOME LEGAL DESCRIPTION (DEED) AND TAX BILL
6. IF YOU HAVE AN LLC, S-CORP OR C-CORP, BRING OPERATING AGREEMENTS AND DATE WHEN BUSINESS ESTABLISHED WITH FULL NAME OF BUSINESS
7. COPIES OF DEEDS YOU MAY OWN WITH OTHER PERSONS (EX: FAMILY FARM, COTTAGE PROPERTY, ETC.)
8. VEHICLE, BOAT, CYCLE TITLES WITH VIN NUMBERS OR SERIAL NUMBERS