LAMSON & CUTNER, P.C.
ATTORNEYS AND COUNSELORS

9 EAST 40TH STREET
NEW YORK, NY 10016
www.lamson-cutner.com
EMAIL:

TEL: (212) 447-8690
FAX: (212) 447-8691

DOCUMENTS TO BRING TO YOUR INITIAL CONSULTATION

For your initial consultation, you should bring as many of the documents as possible on the checklist below. Of course, if you do not have certain of the documents requested, there is no reason to worry. It is not necessary to bring the originals. Copies are sufficient for the consultation. Finally, please note that all money or property, whether held inside or outside of New York State, should be disclosed to us.

1. Power of Attorney
2. Health Care Proxy
3. Living Will
4. Last Will and Testament, and any Codicils
5. Any Trust Agreements and Amendments
6. A list of real property owned anywhere in the world. For each property, its purchase price, and an estimate of its current fair market value.
7. Deeds for properties owned. For co-op apartments, contact information regarding the managing agent.
8. Life Insurance policies, including most recent statements of cash value or surrender value.
9. List of Health Insurance policies, e.g., including Medicare, Medicare Advantage, Medicaid, Medigap, Prescription Drug plans, Supplemental Health Insurance polices, and any Catastrophic Insurance plans.
10. Long-Term Care Insurance policies and declarations page. Daily benefit for home care and nursing home care, lifetime maximum benefit.
11. Latest statements or passbooks for all accounts (checking, savings, CD's, IRA's, mutual funds, securities), including accounts held in a trust or business entity.
12. Stocks or bonds not held in one of the above accounts.
13. Transfer or gifts of money or other property within the past 5 years – amounts, dates and names of recipients.
14. Statement of any income received from any source, e.g., Social Security, pensions, war reparations.