what to gather before starting your estate plan

To make the process smoother, gather the following information and documents before you begin. You don't need everything to start, but it helps us better reflect your wishes.

1 personal information

- full legal name, preferred name, pronouns, and gender identity
- date of birth, social security number, and county of residence
- marital status, prior marriages,
- religious affiliation and related care or directive preferences

2 contact details for beneficiaries & institutions

- names and contact information for beneficiaries (family, friends, etc.)
- contact details for executor(s) and backup(s)
- information for financial advisor, bankers, and key professionals

3 children and other dependents

- names, dobs, and guardianship preferences
- children from current or past relationships
- grandchildren and other dependents (non-children)

4 old estate plans and relevant documents

- existing wills, trusts, and powers of attorney
- prenuptial or postnuptial agreements
- trust agreements, business operating documents, contract

5 current assets and liabilities

- bank accounts (checking, savings, etc.)
- real estate properties (with address, value, mortgage info)
- safe deposit box contents
- investments, stocks, bonds, and outstanding notes
- inheritances, business ownerships, and life insurance policies
- vehicle information (make, model, loan details)

6 specific instructions and legacy wishes

- special bequests, instructions, or legacy messages
- pet care wishes and allocations
- funeral, cremation, or body donation instructions

7 optional but helpful

- medicaid number (if applicable)
- nonprofit organizations you support or want to include in your plan
- any additional instructions or information