

J.M. Evans Law
Trust Check Off List

Name _____

Appointment date/time: _____

Items to Bring for Trust

1. All deeds to all property.
2. All titles for: a) Cars, b) Trailers, c) Boats, d) Recreational vehicles
3. Recent Bank Statements for a) Checking, b) savings, c) other
4. CD's, Savings Bonds
5. Recent Brokerage House Statement
6. Stock and Bond Certificates
7. All Mortgage Notes and Land Contracts where people owe you money.
8. All promissory Notes including those with family members
9. All insurance policies that have cash value
10. All Annuities
11. All Leases including oil and gas right leases
12. All IRA's, Keoghs and 401K (Tax deferred Holdings)
13. All Business Contracts or Stock Certificates
14. Health Insurance Policies (Long term Care, Medicare Supplement, Disability).
15. Old Wills
16. Names of Children with addresses including zip codes and telephone numbers including area codes.
17. Other