G&A

GIRO & ASSOCIATES, LLC

ELDER LAW - ESTATE PLANNING - MEDICAID & ASSET PROTECTION

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What to Bring - Document Checklist

Bring what you can to your consultation. Don't have everything? Come anyway - we'll figure out the rest.
A productive first meeting matters more than a complete folder.

ALWAYS BRING

- [ ] **Government-issued photo ID**
  driver's license or passport for anyone who may sign documents.
- [ ] **This completed intake questionnaire and asset worksheet**
  even partially filled in.

FOR ESTATE PLANNING

- [ ] **Existing will, trust, or power of attorney**
  even outdated versions help.
- [ ] **List of assets and approximate values**
  real estate, accounts, retirement, life insurance, business interests.
- [ ] **Names & contact info for intended beneficiaries**
  spouse, children, family, charities.
- [ ] **Trusted persons for key roles**
  executor, health-care proxy, guardian for minor children.

FOR ELDER LAW / MEDICAID PLANNING

- [ ] **Bank statements**
  up to the last 5 years if available (Medicaid look-back period).
- [ ] **Pension & retirement statements**
  401(k), IRA, pension current balances.
- [ ] **Real estate deeds & property-tax statements**
  including any vacation or rental property.
- [ ] **Long-term care & health insurance policies**
  plus Medicare/Medicaid cards if applicable.
- [ ] **Record of any large gifts or transfers in the past 5 years.**

FOR PROBATE / ESTATE ADMINISTRATION

- [ ] **Original will, if available**
  or a certified copy; even an unsigned draft helps.
- [ ] **Certified death certificate**
  bring several originals if you can.
- [ ] **List of the decedent's assets & debts**
  bank, property, brokerage, loans, credit cards.
- [ ] **Contact information for all heirs and beneficiaries.**

Unsure what's relevant? Message Maurice through your portal before your visit and just ask.