



# TULLY & WINKELMAN, P.C.

150 BROADHOLLOW ROAD, SUITE 120  
MELVILLE, NY 11747  
Phone (631) 424-2800  
Fax (631) 271-9804  
bat@estateplanning-elderlaw.com

## **Documents Requested for Initial Consultation**

Please bring copies of the following important items to the initial consultation:

- \_\_\_\_\_ Completed Questionnaire
- \_\_\_\_\_ Wills (original if possible)
- \_\_\_\_\_ Trusts (original if possible)
- \_\_\_\_\_ Powers of Attorney (original if possible)
- \_\_\_\_\_ Living Wills (original if possible)
- \_\_\_\_\_ Health Care Proxies (original if possible)
- \_\_\_\_\_ Marital Agreements (Pre-Nuptial or Post-Nuptial)
- \_\_\_\_\_ Recorded Deed(s) to all Real Property regardless of location
- \_\_\_\_\_ Recent Tax Bill associated with each property
- \_\_\_\_\_ Long Term Care Insurance Policies
- \_\_\_\_\_ Life Insurance Policies
- \_\_\_\_\_ Annuity Contracts
- \_\_\_\_\_ Medicare Supplemental Insurance Policies (Which Plan?)
- \_\_\_\_\_ Business Agreements (Buy/Sell or Shareholder, etc.)
- \_\_\_\_\_ Pre-Need Funeral Agreements and/or Burial Plot Deeds