



Initial Consultation Checklist

If you cannot locate information or documents, do not worry and do not delay your appointment. Information can always be provided later. Some of the information you may not have, and that is okay. It is more important to get you moving in the right direction.

✓ **COMPLETE THE FIRM'S INTAKE QUESTIONNAIRE**

The first and most important thing to do is to complete the firm's Intake Questionnaire. The Questionnaire can be accessed online here:

<https://www.ternerelderlaw.com/initial-intake>

If for some reason you have difficulty with the online intake questionnaire, call me at (561) 247-2250, or send me an email: daniel@ternerelderlaw.com

The online intake questionnaire will take you through a series of questions about people and finances. It will also help with the conflict check I must do before we speak.

✓ **PROVIDE DOCUMENTS FOR REVIEW**

While completing the online intake questionnaire, you will have the opportunity to upload documents if you have scans. Alternately, you can send documents by email or we can establish and use an encrypted Secure Document Exchange (SDX) portal (it's easier than it sounds).

If you have documents but don't have scans that you can upload, let me know.

The documents that would be most helpful for me to see include:

- Last Wills and Testaments
- Codicils to Last Wills and Testaments
- Trusts
- Trust Amendments or Restatements
- Deeds to real estate



- Partnership Agreements
- Marital agreements
- Financial Powers of Attorney
- Living Wills, Surrogate Designations, Proxies, or Medical Powers of Attorney
- Any other legal documents that haven't been revoked, no matter how old they are or where they were done
- Insurances: It is helpful for me to know the death benefit and cash value of any life insurance policies
- Any disability or long-term care insurance policy papers and pre-need funeral plans.

If your consultation will involve a discussion regarding either estate planning or long term care planning, then please make sure to complete the financial section of the online Intake Questionnaire. If you have trouble with the questionnaire, then as an alternative you can prepare a listing of all assets indicating the name of the financial institution, the type of asset (i.e. savings account, partnership interest, brokerage account, individual retirement account), how the asset is titled (in your name alone, in the name of your Trust, jointly with another person) and the value of the asset. When writing down the value of the asset, try to put down the real or fair market value of the asset close to the day you are preparing this inventory. You can utilize the worksheet located at <https://www.ternerelderlaw.com/TEL-Worksheet-Financial.pdf>. If you cannot put everything in a list, the next best thing will be account statements. (If you provided Asset Information via the online Intake Questionnaire located at <https://www.ternerelderlaw.com/initial-intake>, there is no need to use the worksheet).

If your consultation will involve a discussion regarding the preservation of existing public benefits, then please provide any documentation you can concerning the nature and amount of the government benefits at issue.

If you have trouble with the online intake questionnaire, then you can use the worksheet located at <https://www.ternerelderlaw.com/TEL-Worksheet-Family-Members.pdf> to prepare a list of your immediate family members' names, addresses and telephone numbers. If you are coming in regarding your parents, please provide the same information for them and any of your siblings, if applicable. Include even estranged family members. (If you have already completed the online Intake Questionnaire, there's no need to use this worksheet, too).

I recognize that coming up with all the information and documents listed above can be difficult for some people. Please do not be concerned. Remember that all I really need is you. Documents, statements and an inventory can always be achieved later.

✓ **REMIT THE CONSULTATION FEE**

You can do so here: <https://secure.lawpay.com/pages/ternerelderlaw/operating>

