

# What to Bring to a Lawyer



To reduce your legal fees, prepare as many documents in advance as possible and bring them with you when you consult with an attorney.

## Checklist of Documents to Bring to a Lawyer

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- Bank accounts and balances
- Credit card accounts and balances
- Custody agreements
- Death certificate
- Divorce decree
- Funeral expenses
- Health insurance policy
- Investments, stocks, bonds, and mutual funds accounts and balances
- Life insurance and annuities policies
- List of personal property
- Marriage certificate
- Military and veterans benefits eligibility
- Military paperwork (for example, Discharge Certificate (Form DD 214), Report of Casualty (DD Form 1300), or Certificate of Death Overseas (DD Form 2064))
- Organ donation certificate
- Outstanding bills
- Pre-nuptial agreement
- Pension information
- Personal property appraisals, if applicable
- Real estate holdings (including legal descriptions and deeds)
- Retirement, IRA, ROTH, and 401K accounts and balance

- Social Security number
- Tax return from the year prior
- Trust(s)
- Will
- W-2 forms from year prior
- Vehicle make, model, VIN#, blue book value, and title