

Documents for 1st Estate Planning Meeting

- 1. Copies of present documents, including Wills, Trusts, Powers of Attorney, and Interests in Ownership of a Business Entity**
- 2. Copies of deeds for any real estate ownership**
- 3. Financial statement with approximate values**
- 4. Full names, addresses, and dates of birth for any beneficiaries to be named**

ROCK ISLAND OFFICE:

**423 - 17TH STREET, SUITE 102
ROCK ISLAND IL 61201
(309) 794-9400**

WATERLOO OFFICE:

**227 EAST SAN MARNAN DRIVE
WATERLOO IA 50702**

WWW.WESSELSPC.COM