Your attorney meeting summary

U.S. working edition v0.3. Preferences and questions only; not a legal instrument. Use aliases and document references. No secrets or full account/ID numbers.

Prepared by / alias and meeting date

Top three goals

Home state and other property jurisdictions

Existing plans and document-location references

Unresolved choices / priority question

Missing records and follow-up

Private discussion requested? Access or language needs?

Ask about: suitable documents; representation and private information; fees and process; execution requirements; ownership, beneficiary and funding coordination; future reviews.