WILLS & TRUSTS: PREPARE FOR YOUR ATTORNEY MEETING

A companion to the Family Emergency & Legacy Binder
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BEFORE YOU BEGIN

For U.S. readers generally. State laws and individual circumstances differ. This workbook does not tell you which legal documents to choose or how to execute them. Ask an attorney licensed for the relevant jurisdiction about your circumstances.

You do not need every answer before you meet an attorney. This workbook helps you identify what matters, find useful records and bring better questions. Start with your three most important concerns. Return to the other pages when you have time or when your attorney asks.

These pages record questions and preferences for discussion. They are not a will, trust, power of attorney, healthcare directive or signed declaration. Completing them does not appoint anyone, change ownership or beneficiaries, or give someone access to an account. Your attorney should explain which documents and steps fit your circumstances and the laws that apply.

Use this workbook on your own or alongside other people involved in planning. Each person may keep a separate copy. A shared meeting does not mean every answer must be shared. Ask the attorney about private discussion, who they would represent, and how information from joint meetings is handled before sharing sensitive matters.

At any question, you may write: UNSURE / NOT APPLICABLE / DISCUSS PRIVATELY WITH ATTORNEY. Blank spaces are invitations, not requirements. Do not guess merely to finish a page. You may use an alias or relationship description rather than a full name in a working copy.

Keep passwords, PINs, recovery phrases, full account numbers and government identification numbers out of these pages. Use short descriptions and secure document-location references. Ask the attorney what records are needed and how to transfer them securely. Do not send completed copies to DTP support. Check your device's sharing and backup settings before entering private information; this document does not provide encryption or control your device's cloud storage.

Your working copy

Prepared by or private alias:

Date last reviewed:

Meeting date, if arranged:

Preferred language or communication format:

Access needs, such as large print, breaks or an interpreter:

This copy is intended for:

1. WHAT DO YOU WANT THE MEETING TO ACCOMPLISH?

Think about the people, responsibilities and decisions that brought you here. You can describe a worry without knowing its legal solution.

My three priorities

Priority 1

Priority 2

Priority 3

What would make me feel better prepared after the meeting?

What prompted me to begin or revisit planning now?

Are there time pressures I want the attorney to know about?

What plans or documents already exist, if any? Record a description, approximate date and location reference; do not assume an older document is current.

What am I most uncertain about?

What would I prefer to discuss privately?

First small step: choose one record to locate or one question to bring. You can attend with an incomplete workbook and explain what is still missing.

My first step:

2. FAMILY, HOUSEHOLD AND CARE RESPONSIBILITIES

Describe the relationships that may matter to your planning. Include people outside your household if appropriate. Use the words that fit your family. You can leave personal history for a private conversation.

Current marital or partnership circumstances to discuss:

Prior marriages/partnerships, separations, agreements or obligations that the attorney may need to understand:

Children, dependents or others I help support or care for:

Blended-family relationships or differing wishes to explain:

Care arrangements, support needs or existing court arrangements to discuss, if relevant:

Repeatable person/context note

Person or alias:

Relationship and relevant context:

Care or support responsibility I want to discuss:

Existing document/location reference, if known:

Question for attorney:

Sharing choice: shared meeting / private discussion / unsure

Do not put a diagnosis or a detailed personal history here merely because you think a complete form requires it. Ask what information is relevant and how to share it.

3. PEOPLE AND ROLES TO DISCUSS

The names below are possibilities for a conversation, not appointments. Ask your attorney to explain each role, whether it is relevant, the legal requirements, and any conflicts or practical difficulties. The same person does not need to be proposed for every role.

Consider these separate questions:
- Who might receive property or a particular gift? Who else might I want to discuss if my first preference cannot apply?
- Who might handle estate responsibilities as executor or personal representative?
- If a trust is appropriate, who might serve as trustee or successor trustee?
- Who would I want the attorney to consider when discussing care or guardianship for minor children?
- Who might help with financial decisions if I cannot make them?
- Who might help with healthcare decisions if I cannot make them?

Repeatable role discussion card

Role or gift question:

First person/organization to discuss:

Alternative to discuss, or unsure:

Why I am considering them:

Have I asked about willingness? yes / no / not yet appropriate

Practical questions: location, availability, capability, conflicts or support needed:

Existing appointment/document reference, if any:

What needs attorney clarification?

Safe contact-reference location, if follow-up is needed:

4. ASSETS, OBLIGATIONS AND RECORDS

Build a map, not a list of secret access details. Approximate values or "unknown" are enough for this first conversation unless the attorney requests something more specific. Record what a document appears to say and mark it for confirmation; do not make ownership changes from this worksheet.

Consider each category; mark it relevant, not applicable or unsure:

Real estate and land:

Bank, savings and investment accounts:

Retirement accounts or plans:

Life insurance or other relevant benefits:

Business interests and agreements:

Vehicles, valuable personal items or collections:

Digital assets or accounts with value or legacy arrangements:

Debts, guarantees or other obligations:

Property or interests in another state or country:

Other items the attorney should know about:

Repeatable asset/obligation card

Short description or alias:

Approximate value/balance and date, or unknown:

Owner(s) as shown on the available record, or unsure:

Location/jurisdiction, where relevant:

Related debt or obligation, if any:

Beneficiary designation or other arrangement shown on a record, if relevant; record date/location or "not checked":

Source document/location reference:

What looks unclear or inconsistent with my wishes?

Question for attorney:

Do not assume a name in one document settles what happens to an asset. Ask the attorney how documents, ownership and beneficiary arrangements should be reviewed together. Do not transfer assets or change designations just to match a draft preference on these pages.

5. WISHES AND OPEN DECISIONS

Write the outcome you hope for in everyday words. Leave the legal wording and the choice of legal arrangements to discussion with your attorney.

People or organizations I would like to discuss providing for:

Specific items, gifts or charitable intentions to discuss:

Concerns about timing, conditions, fairness or different needs:

Support or continuity for dependents, including circumstances I prefer to explain privately:

Pet care preferences and people to consult:

If I could not make decisions, what concerns would I want my attorney and appropriate healthcare professionals to understand?

Personal or end-of-life wishes I want to discuss, and any existing document locations:

Business, property in other jurisdictions, family disagreement, benefit eligibility or other complex circumstances to raise:

Decisions I am not ready to make:

For any preference, add: What matters about this to me? What alternatives would I want explained? You do not need to resolve a family disagreement to record that it needs discussion.

6. WHAT PAPERWORK MIGHT BE USEFUL?

Ask the attorney which items apply before gathering or sharing sensitive records. This is a menu for discussion, not a requirement to produce everything. Ask whether copies, originals, identification or tax records are needed, who needs to attend, and how documents should be delivered and returned.

Possible records to ask about

[ ] Existing wills, trusts and amendments, with dates if known
[ ] Powers of attorney and healthcare directives
[ ] Property deeds, title records and mortgage information
[ ] Recent statements for relevant assets and debts
[ ] Retirement and insurance beneficiary confirmations
[ ] Business ownership records and agreements
[ ] Relevant marital, divorce, support or court documents
[ ] Prior gift/estate-related or tax records, if requested
[ ] Adviser/contact list and relevant prior correspondence
[ ] Other records specifically requested by the attorney

Before sending anything

What does the attorney actually want?

Copies or originals?

Agreed secure transfer method and verified recipient:

Who will retain or return originals?

Items I need to discuss privately before sharing:

7. DOCUMENT TRACKER

Record where to find a document rather than copying its sensitive contents. If you already use the Legacy Binder, reuse its document-index reference and check that the location is still correct. A location note does not itself authorize anyone to access a document.

Repeat this entry for each useful record:

Document description/reference:

Document date/version, or unknown:

Status: available / missing / requested / not applicable

Secure location or existing Binder index reference:

Person responsible for locating it:

Follow-up date:

Question, access issue or attorney request:

If an item is missing, bring that fact to the meeting. Do not delay a needed conversation solely to make the tracker look complete.

8. YOUR MEETING SUMMARY

Copy only the details you choose to share. This summary is a discussion aid; keep more sensitive notes separate. It is designed to stand on its own when taken to a meeting.

WILLS & TRUSTS - ATTORNEY MEETING SUMMARY

Preferences and questions only; not a legal instrument.

Prepared by/alias: Reviewed on:

Meeting date:

Top three goals:

Priority 1

Priority 2

Priority 3

Home state/country and other property locations to discuss:

Existing plans and document-index references:

Most important unresolved choices or concerns:

Missing records and next follow-up:

Private conversation requested? yes / no / unsure

Language, access or communication needs:

Questions to choose from

- Given my circumstances, what should we consider when deciding whether a will, trust or other documents are appropriate?

- Who would you represent, and how would joint meetings and private information be handled?

- Which laws or property locations need attention? Is another professional needed?

- What services are included in your fee? What costs or follow-up work are separate? What is the expected process and timeline?

- Which documents, people and formal steps would be needed to put an agreed plan into effect?

- How should ownership, any trust funding, beneficiary designations and existing documents be coordinated? Who would do and verify each step?

- How should documents be stored and access arranged?

- When should we review the plan, and what changes should prompt a call?

My own priority question:

9. AFTER THE MEETING

Record the attorney's recommendations in your own words, then clarify anything you do not understand. A note here does not perform the action. Ask who is responsible, what must happen first, and how completion will be confirmed.

Repeatable action card

Recommendation or action discussed:

Who gave the recommendation and meeting date:

My understanding of the next step:

Responsible person:

Due date or agreed follow-up date:

Documents/information needed first:

Question to clarify before acting:

Status: not started / waiting / in progress / reported complete

Completion confirmation or document-location reference:

Future review reminder agreed with attorney:

Where I will keep the current plan and location references:

Who, if anyone, should know where to find those references?

Before you finish, separate your working preferences from executed documents. Ask the attorney how to identify and handle current, superseded and unsigned copies. Update only the appropriate location and review references in your Binder; do not treat this workbook as a replacement legal document.

FICTIONAL WALKTHROUGH - NOT ADVICE FOR A REAL FAMILY

Morgan is preparing for a first attorney meeting. Morgan wants to discuss support for a child, care for a dog, and what would happen if Morgan could not make financial decisions. Morgan is unsure whether a trust would help and has not chosen a person for every role.

Morgan writes three goals on the summary and marks the trust question "unsure." On the role card, Morgan writes "sibling - willingness not yet discussed," rather than treating the sibling as already appointed. Morgan keeps a sensitive family concern on a separate private-discussion note.

The asset card says "home; ownership record not checked; deed location reference D-01." A retirement-account card says "beneficiary confirmation requested; no account number recorded." Morgan's document tracker records D-01 as available and the beneficiary confirmation as requested, with Morgan responsible for follow-up. No ownership or beneficiary changes are made.

At the meeting, Morgan asks what documents and arrangements fit the circumstances, what the attorney's fee includes, and which records need further review. Afterward, Morgan records the attorney's actual recommendations and asks for clarification before taking any unclear action. The fictional example deliberately leaves legal outcomes open.

WORKING-EDITION NOTICE
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