

**W. Albert Weatherly, Attorney at Law, PLLC**  
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**DOCUMENTS NEEDED FOR ESTATE PLANNING**

Please email to [becky@weatherlylawoffice.com](mailto:becky@weatherlylawoffice.com) or bring this information to our office at your earliest convenience.

- ☐ Current and/or prior Estate Planning documents (Trusts, Wills, Durable Powers of Attorney, Medical Powers of Attorney, Living Wills, Directives to Physicians, and Declaration of Guardian)
- ☐ Any Premarital or other Marital Property Agreements
- ☐ Bank Statements (checking accounts, savings accounts, money market accounts or certificates of deposits) (most recent statement)
- ☐ Investment Accounts, 401K, IRA, Stocks, Bonds, Securities, Mutual Funds, Annuities and all other financial assets and accounts (most recent statement)
- ☐ SSI, TRS and/or Pension (most recent statement)
- ☐ Life Insurance (most recent statement)
- ☐ Pre-need Funeral Contract – copy of contract
- ☐ Oil, gas, or other mineral production (most recent statement)
- ☐ Mortgage or Promissory Notes
- ☐ Crypto Assets (most recent statement)
- ☐ Business Interests (Organizational Documents)
- ☐ Contact Information for Agents (Executor and Power of Attorney Agents) & Children
  - Names
  - Addresses
  - Phone Numbers
  - Email Addresses
- ☐ Other documents requested:

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