



ESTATE PLANNING
LAW CENTER PLLC

Planning For Life

LIST OF INFORMATION TO GATHER

- 1** Full legal name, date of birth, address (including county) for person(s) creating trust.
- 2** Names and addresses for all children, including those from prior marriage, predeceased, and adopted children.
- 3** Copies of all deeds for real estate within the State of Oklahoma.
- 4** Copies of all deeds for real estate outside the State of Oklahoma.
- 5** Copies of deeds for burial plots.
- 6** Copy of most recent bank and credit union statements, which show the account number, address of bank/credit union, and the style of the account.
- 7** Copy of most recent brokerage account statement showing name of account, brokerage company name, address for brokerage company, and account number(s).
- 8** Copy of most recent IRA, 401K, Pension, or other retirement account statement-showing name on account, institution of which funds are in, account number, and address.
- 9** Copy of all vehicle titles, including recreational vehicles, motorcycles, motor homes, and vehicles collected, boats, motors, etc.
- 10** Information on life insurance policy(s) including name of insurance company, address of insurance company, policy number, name of insured and change of beneficiary forms.