WILLIAM J. NEALON III
ATTORNEY AT LAW

Estate Planning & Estate Administration Consultations

Estate Planning

Depending upon the complexity of your case, you can expect to spend approximately 45 minutes with the attorney. You should bring with you copies of the following: (i) bank account statements (individual and joint accounts), including balances and joint tenant information; (ii) a description of any real property owned (individually or jointly) and the approximate value; (iii) copies of statements pertaining to IRAs and annuities; (iv) information relating to stock and bonds owned (individually and jointly); (v) information regarding any work-related retirement benefits; (vi) any other asset information you may possess; and (vii) the names, addresses and telephone numbers of anyone you will be listing as a beneficiary.

Also, please give thought to the following: (i) the person(s) you wish to designate as Executor/ Executrix of your Estate (who will take care of the business of probate); (ii) the person(s) you wish to act as Trustees for the assets left to any minor children or otherwise left in Trust; (iii) the person(s) you wish to act as Guardian of the person of any minor children; (iv) the person(s) you wish to handle your business matters in case you are alive, but incapacitated (Durable Power of Attorney) NYS General Durable Power of Attorney, Major Gifts Rider; and (v) the person(s) you wish to handle decisions pertaining to your health care in case you are alive, but incapacitated. (Advance Directive: Living Will and Health Care Proxy)

Please complete our Estate Planning Survey Form and bring it with you to your consultation as this will help the attorney assess your desires. The standard consultation fee of $95.00 is payable at the time of this consultation.

Estate Administration

You should plan on spending approximately 45 minutes with the attorney and should plan on bringing the following with you to your consultation: (i) certified copy of the Death Certificate; (ii) a copy of the obituary; (iii) the original Will (if there is one); (iv) Family Tree information; (v) a copy of the funeral bill and any other costs incurred in connection with the funeral; (vi) information pertaining to any safe deposit box(es), including location and list of contents; (vii) asset information including: (a) jointly and individually owned bank account information; (b) annuity/IRA information; (c) stocks and bonds; (d) retirement information; (e) information pertaining to cash on hand; (f) information regarding insurance policies; (g) registration and title information of any vehicles owned by the Decedent; and (h) Deed(s) and Title(s) to property owned by the Decedent; and (viii) debt information including credit cards, utility bills, mortgage/ rent information, loan information, etc.

Please complete our Estate Administration Survey Form and bring it with you to your consultation as this will help the attorney assess your needs. The standard consultation fee of $95.00 is payable at the time of this consultation.