



- \_\_\_\_\_ Copies of titles to all motor vehicles, motorcycles, ATVs and/or boats/campers/etc. you own. Include copies of vehicle loan documents and/or vehicle leases and insurance Declarations page, indicating coverage and loss payee.
- \_\_\_\_\_ Copies of all life insurance policies, including current cash values and current beneficiaries.

**REAL ESTATE AND MOBILE HOMES:**

- \_\_\_\_\_ Copy of Recorded Deed(s)\* to all properties you own.
- \_\_\_\_\_ Copy of Mobile Home Title(s) for all mobile homes you own still taxed as personal property
- \_\_\_\_\_ Copy of Recorded Mortgage(s)\* to all properties you own.
- \_\_\_\_\_ Copy of any Recorded Federal Tax or Workers Compensation Lien(s)\*
- \_\_\_\_\_ Copy of Judgment Lien(s) against you filed in the Common Pleas Court in any county where you own real estate.
- \_\_\_\_\_ Copy of any Land Installment Contract(s).
- \_\_\_\_\_ Recent appraisal and/or Real Estate or Personal Property Tax Card from the County Auditor's office
- \_\_\_\_\_ Homeowner's insurance Declarations page for all properties, indicating coverage and loss payee.
- \_\_\_\_\_ Closing Statement from the sale of any real estate within the last year.

\*(Get these documents from the Recorder's Office in your County of residence.)

Please do not hesitate to contact our office if you have any questions. We look forward to meeting with you at the above-scheduled date and time!

P.S. The decisions you make will affect you financially for the next several years and we want to make sure we are all focused on the task at hand. While small children are wonderful and we love them too, they can be a distraction; so we ask that, unless absolutely necessary, you do not bring children to your appointment.