

**RAY LAW OFFICES, A Professional Corporation**

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LINDA M. RAY, CLIENT SERVICES MANAGER

VOICE (636) 464-8353  
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**TO: Prospective Clients**

**FROM: Linda M. Ray, Client Services Manager**

**RE: Your Initial Estate Planning Appointment**

Thank you for making your initial estate planning appointment with Ray Law Offices, P.C. We are honored that you have chosen to let us assist you with your estate planning needs. During this meeting, which generally lasts one to two hours, Mr. Ray or Mr. Estep will examine your estate planning goals and objectives; he will also discuss strategies for achieving these purposes.

To ensure that your consultation is accurate and meaningful, we need your help with two important tasks. **First, please answer the Estate Planning Questionnaire and fax (636-464-2797) or mail it to us not less than 3 days before your appointment.** The attorney must review this information before your appointment. The Questionnaire provides a complete picture of your present financial situation and your personal financial philosophy. *Without this critical information, our ability to advise you is severely compromised.* The questionnaire can be downloaded from our website.

**Second, please locate the documents listed below and bring them with you to the meeting.** (Originals or copies of originals are satisfactory.):

1. Any estate planning documents such as Wills, Trusts, Business Buy Sell Agreements, etc.
2. Deeds and/or Deeds of Trust.
3. Life Insurance papers.
4. Statements for any bank accounts and/or brokerage accounts.
5. Stock Certificates and/or bonds that you hold yourself.
6. Any other financial documents representing assets that you own.

You have already taken the first step toward achieving your personal estate planning goals. Now, make the most of your consultation with our by sending us your completed Estate Planning Questionnaire and bringing the necessary documents to the meeting.

We look forward to meeting you. Please call us if we may answer any questions or provide assistance before the meeting.