

BEFORE YOUR FIRST MEETING

Before visiting our offices for a first meeting with Attorney Jane Morrison, please review the following check list of information and items to bring with you. This will help maximize the benefit of your time and the services we provide.

Estate Planning:

If you are meeting with Jane for assistance with Estate Planning, please see the related document, "Estate Planning: Issues for Consideration." This is an extensive list of issues to consider; don't be put off or overwhelmed. Review the list generally and come in for your in-person consultation. Estate planning is necessary for everyone. Get started now and let Jane help walk you through the planning process.

Probate Assistance:

If you are meeting with Jane for assistance with administering the estate of someone who has died, please be sure to bring with you the following:

1. A copy of the Will, if available.
2. A list of the decedent's close family members such as spouse/partners, children, parents and siblings. Include legal names, addresses and ages. If these close family members predeceased the decedent, indicate the date of death. Make every effort to obtain as much of this information as possible.
3. A copy of the decedent's Birth Certificate.
4. A copy of the decedent's Death Certificate.
5. Any invoices for the decedent's funeral or memorial service.

Partnership Disputes and Dissolutions:

Jane can assist you in resolving your disputes and partnership break-ups formally to achieve a clear division of assets and resolve questions of ownership, ongoing responsibility, and liability for debts and other obligations. Each partnership dissolution is unique. Make a list of the issues about which you are concerned and any real property or accounts that are in both your names. Generally, Jane represents only one party in a partnership dissolution. We are happy to make a referral to other attorneys to represent the other half of a separating couple.

Partnership Agreements:

Jane works with unmarried couples (as well as couples who are concerned that the State may not recognize their marriages) to create joint ownership and use agreement for real and personal property. Be sure to bring with you:

1. A copy of the Deed for any Real Property that you own together or separately.
2. A list of all assets that you may wish to include in the partnership.
3. A list of any assets that you may wish to keep separate.

Pre Nuptial Agreements:

For those couples to whom the law does grant the right to get married, Jane can assist with preparing a contract to specify which assets and property rights you wish to include in the marriage. This is especially important for people entering into marriage later in life or those who may have children from a former marriage. Be sure to bring with you:

1. A copy of the Deed for any Real Property that you own together or separately.
2. A list of all assets that you may wish to include in the marriage.
3. A list of any assets that you may wish to keep separate.

Non Profit Organizations:

Jane assists individuals and groups establish non-profit organizations and works with organizations on governance issues. You may want to meet with Jane as a group with as many as three or four key persons involved in the organization or start up effort.

If starting a new enterprise, you should bring with you

1. A description of your organization's intended work and purpose.
2. A list of the names and addresses of the people involved.
3. A list of your proposed funding sources.

If your organization is already established, bring with you:

1. Summary of your organizations purpose and history.
2. Any documentation relating to your group's history, prior incorporation papers, etc.

Small Businesses:

Jane can assist you with determining what business structure is right for you, whether a Corporation, Limited Liability Company, Partnership or other entity. If starting a new enterprise, you should bring with you:

1. A description of your businesses intended work, product or services.
2. The names and addresses of the people involved in the business venture, owners, managers, investors, employees, etc.