

Make the most of our first meeting.

LAND AS YOUR LEGACY® TRANSITION PLANNING DOCUMENT CHECKLIST

In order to determine the best plan for your farm or ranch, we need to review your current financial situation. So, please bring the following documents to our first meeting. Unless otherwise indicated, the most current statement is all you need.

<input type="checkbox"/> Tax returns (last two years)	<input type="checkbox"/> Mortgages or notes payable to you
<input type="checkbox"/> Bank statements (last three months)	<input type="checkbox"/> Wills and trust agreements
<input type="checkbox"/> Brokerage statements	<input type="checkbox"/> Durable powers of attorney
<input type="checkbox"/> Mutual fund statements	<input type="checkbox"/> Health care powers of attorney
<input type="checkbox"/> Bond instruments	<input type="checkbox"/> Living wills
<input type="checkbox"/> Annuity contracts	<input type="checkbox"/> Auto and homeowners insurance policies
<input type="checkbox"/> Life insurance policies	<input type="checkbox"/> Umbrella policy
<input type="checkbox"/> Long-term care policies	<input type="checkbox"/> Statements for mortgages and your other debts
<input type="checkbox"/> IRA statements	<input type="checkbox"/> Company benefits package
<input type="checkbox"/> All retirement plan statements	<input type="checkbox"/> Partnership agreements
<input type="checkbox"/> Social Security benefit estimate	<input type="checkbox"/> Privately held corporation stock certificates
<input type="checkbox"/> Deferred compensation statement	<input type="checkbox"/> Buy/sell agreements
<input type="checkbox"/> Deeds or land contracts	<input type="checkbox"/> Oil, gas and mineral interest agreements
<input type="checkbox"/> Other relevant documents	

Nationwide and its representatives do not give legal or tax advice. Please consult your attorney or tax advisor for answers to specific questions.

• Not a deposit • Not FDIC or NCUSIF insured • Not guaranteed by the institution
• Not insured by any federal government agency • May lose value



Life insurance is issued by Nationwide Life Insurance Company or Nationwide Life and Annuity Insurance Company, Columbus, Ohio.

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