



**PENNIX LAW**  
*Forging solutions for your future.*

# What to Bring to Your First Meeting

A streamlined prep guide to make your first conversation more productive, whether you need estate planning or small business guidance.

## If You Need Estate Planning Help

- A list of major assets, debts, and account types
- Names of the people you may want to appoint or protect
- Any existing estate planning documents
- Questions about wills, trusts, powers of attorney, or probate
- Updates on marriages, divorces, births, deaths, or relocations

## If You Need Small Business Law Help

- Basic information about your business or business idea
- Existing formation documents, contracts, or proposals
- Questions about entity type, ownership, or operations
- Any dispute, risk, or compliance concerns you want to flag
- Your short-term business goals and practical next steps

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## Helpful for Either Type of Meeting

- A short list of your top priorities
- A timeline for any urgent decisions
- Any paperwork you already have, even if incomplete
- A notebook or phone note with questions you do not want to forget

These materials are educational starting points and not a substitute for legal advice tailored to your situation.

**Need help applying this to your family or business? Schedule a consultation with Pennix Law.**