

# The Law Office Of Judy S. Mock, P.C.

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## ***Advanced Directives Initial Consultation Checklist***

**The following documentation will be necessary for your Initial Meeting.**  
(下列文件将需要为您的首次会议)

### ***Photo Identification (照片身分證)***

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Driver's License or Passport (駕駛執照或護照)

Immigration Status 移民身份 (綠卡/公民)

Social Security Card (社會安全卡)

### ***Marital Status (婚姻狀況) / Familial Information (家庭)***

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Photo Identification and Social Security Card for Spouse (配偶 照片身分證) (配偶社會安全卡)

Marriage certificate (結婚證書)

Previously Married? (以前結婚) Divorce decree (如果是, 離婚判決, 配偶死亡證明書)

Photo Identification and Social Security Card for Children (兒童照片身分證) (配偶社會安全卡)

Disabled Child (如果你有一個殘疾兒童, 請提供殘疾證明和照片身份證明)

### ***Financial Information (財務資料)***

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Copy of Deed(s) (任何不動產契約由申請人或配偶擁有)

Copy of any and all mortgage Invoices (按揭發票)

Bank Statements – 4 months (支票賬戶/儲蓄戶口/證券4個月報表)

Investment Accts: (Stocks, Bonds, Mutual Funds, CDs, and etc.) (投資賬戶: 股票, 債券, 共同基金, 定期和等)

Motor Vehicle Title(s) (機動車由申請人或配偶擁有)

Life insurance and Annuity Policies including values (終身壽險, 人壽保險及年金政策, 包括價值)

Tax Returns for past 3 years (報稅表3年)

## **Miscellaneous Information (杂项信息)**

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Trust Agreements (信託協議)

Funeral/Burial Agreements (葬禮協議)

Power of Attorney (授權書)

Health Care Proxy and Other Advanced Directives (醫療護理委託書及其他指令)