

# Before You Go to Trial: Consultation Prep Checklist

Bring this to your consultation with Rocky Mountain Elder Law

## Know Your Situation

- Who are the parties involved? (List names and their relationship to you and to the deceased/incapacitated person)
- What is the dispute about? (A will, a trust, guardianship, financial exploitation, something else?)
- When did the dispute begin, and what triggered it?
- Has anyone already hired an attorney or filed anything in court?

## Gather Your Documents

- The most recent will and any prior versions you're aware of
- Any trust documents
- Death certificate (if applicable)
- Financial account statements or records you believe are relevant
- Any written communications (texts, emails, letters) related to the dispute
- Medical records if mental capacity is in question
- Any court filings already made

## Understand What You Want

- What outcome are you hoping for?
- Is your primary goal financial, or is this about honoring someone's wishes?
- How important is preserving relationships with the other parties?
- Are you open to settlement or mediation, or do you feel trial is necessary?

## Know Your Limits

- What is your approximate budget for legal fees?
- How much time can you realistically dedicate to this process over the next 1-2 years?
- What is your emotional bandwidth? Do you have support around you?

Ready to take the next step? Let's talk about your situation.

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