

## Estate Planning Intake Form

<b>Client Information:</b>	<b>Spouse/Significant Other Information:</b>
<b>Full Name:</b> _____	<b>Full Name:</b> _____
<b>Home Address:</b>	<b>Home Address:</b>
_____	_____
Number & Street	Number & Street
_____	_____
City, State, Zip Code	City, State, Zip Code
_____	_____
County	County
<b>How Long Have you Lived at this Residence:</b> _____	<b>How Long Have you Lived at this Residence:</b> _____
<b>Telephone Numbers:</b>	<b>Telephone Numbers:</b>
Home: _____	Home: _____
Cell: _____	Cell: _____
Fax: _____	Fax: _____
<b>Email:</b> _____	<b>Email:</b> _____
<b>Marital Status:</b> (need copy of pre nuptual agreement(s) if any)	<b>Marital Status:</b> (need copy of pre nuptual agreement(s) if any)
Currently Married:    Y            N	Currently Married:    Y            N
Name of Spouse: _____	Name of Spouse: _____
Date of Marriage: _____	Date of Marriage: _____
<b>Prior Marriage(s):</b> Y            N	<b>Prior Marriage(s):</b> Y            N
Prior Marriage (most recent)	Prior Marriage (most recent)

_____ Spouse Name _____ Date of Marriage      Date Terminated _____ Terminating Event _____ Obligations pursuant to a Marriage Settlement Agreement	_____ Spouse Name _____ Date of Marriage      Date Terminated _____ Terminating Event _____ Obligations pursuant to a Marriage Settlement Agreement
<b>Citizenship</b> U.S. Citizen            Y            N U.S. Resident        Y            N _____ Citizenship Country (if other than U.S.)	<b>Citizenship</b> U.S. Citizen            Y            N U.S. Resident        Y            N _____ Citizenship Country (if other than U.S.)

**Children and Other Dependents**

Include deceased children (if any) and indicate (D) after name. Indicate adopted children with (A) after name.

1. Children Born to Both Husband & Wife

<i>Child's Name</i>	<i>Spouse's Name</i>	<i>Address</i>	<i>Telephone</i>	<i>Birth Date</i>	<i>Child's Children and Ages</i>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

2. Other Children From Prior Marriage(s) (if any)  
 (indicate which spouse's child by (H) for husband and (W) for wife)

<i>Child's Name</i>	<i>Spouse's Name</i>	<i>Address</i>	<i>Telephone</i>	<i>Birth Date</i>	<i>Child's Children and Ages</i>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

3. If Any of Your Beneficiaries are Disabled or Have Special Needs, Please List.

<i>Beneficiary's Name</i>	<i>Disability or Special Need</i>	<i>Birth Date</i>	<i>Relationship</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Guardians**

If a child is under the age of 18 and if both parents should die, then the court will appoint a guardian of the person and a guardian of the property for that child. Often a single person or couple serves in both capacities. A parent may nominate those guardians in his will, and the court will give weight (but will not be bound) by that nomination.

1. Proposed Guardian of the Person

Name and Relationship	Address	Telephone
_____	_____	_____
_____	_____	

2. Proposed Guardian of the Property (if Different From #1)

Name and Relationship	Address	Telephone
_____	_____	_____
_____	_____	

3. Alternate Guardian of the Person

Name and Relationship	Address	Telephone
_____	_____	_____
_____	_____	

4. Alternate Guardian of the Property (if Different From #3)

Name and Relationship	Address	Telephone
_____	_____	_____
_____	_____	

**Trustees & Personal Representatives**

1. Trustee & Successor Trustee Over Any Trusts To Be Created

Name	Address	Telephones
Initial Trustee _____ _____	_____ _____	_____ _____
Co-Trustee (if any)		

_____	_____	_____
Successor Trustee	_____	_____
_____	_____	_____

2. **Personal Representative/Executor & Successor Personal Representative**  
 Personal Representative must be 18 years of age and have no felony convictions. Additionally, if the personal representative lives out-of-state, he/she must be a relative of the testator/testatrix.

Name	Address	Telephones
Initial Personal Rep _____	_____	_____
Co-Personal Rep (if any) _____	_____	_____
Successor Personal Rep _____	_____	_____