

ESTATE PLANNING INTAKE

1. CLIENT INFORMATION

	Person 1	Person 2
Full Name		
Other Names Used		
Email		
Preferred Phone		
Age		
Country of Citizenship		
Employment		
Military Service		
Formal Marital Status		
Prior Marriages		
Child Support / Alimony		
Any Health Concerns?		

2. CHILDREN & DEPENDENTS

		Parents		
Child's Name	Age	1	2	Both

Do you have specific concerns relating to any of your children? Yes No

If yes, briefly describe the nature of your concerns. (We will discuss this in more detail during consultations.)

3. PLANNING GOALS/CONCERNS — Please check any of the following issues that are important to you:

Planning for potential incapacity or a disability;

Maintaining control over your assets while you are alive;

Ensuring that your end of life wishes are respected;

Addressing a conflict with a family member that could affect your estate plan;

Ensuring that your estate plan stays in tact in the event you die and your spouse remarries;

Questions about planning in a blended family;

Planning for any concerns you may have about your children's lifestyle, marriage;

Avoiding estate taxes (aka "death taxes");

Avoiding probate.

4. ASSETS (Rough estimates are fine.)**Total Asset Value (Net Worth)**

Estimated Net Worth	Person 1	Person 2	Joint
Under \$100,000			
Between \$100,000 and \$5 Million			
Over \$5 million			

Asset Types/Classes

Asset	Person 1	Person 2	Jointly Owned
Primary Residence	\$	\$	\$
Other Real Estate	\$	\$	\$
Business Ownership	\$	\$	\$
Retirement (401k, IRA)	\$	\$	\$
Pension	\$	\$	\$
Life Insurance	\$	\$	\$
Annuities	\$	\$	\$
Securities	\$	\$	\$
Cash/Bank Accounts	\$	\$	\$
Personal Property	\$	\$	\$
Antiques, Jewelry, etc.	\$	\$	\$
Anticipated Inheritance	\$	\$	\$
Other Assets	\$	\$	\$

5. AGENT DESIGNATIONS AND PREFERENCES — Naming a second choice to serve as a backup or successor is strongly recommended. Naming a third choice is optional.

Personal Representative (aka Executor) – manage your estate or probate affairs if needed.

	Person 1	Person 2
First (often a spouse)		
Second		
Third (optional)		

Trustee & Successor Trustee – will manage your trust after you die or become incapacitated.

	Person 1	Person 2
First (often self)		
Second		
Third (optional)		

Power of Attorney Agent – can make financial, legal, and property decisions on your behalf.

	Person 1	Person 2
First (often a spouse)		
Second		

Health Care Agent – authorized to make decisions and obtain records on your behalf.

	Person 1	Person 2
First (often a spouse)		
Second		

Guardian(s) for Minor Children – responsible for raising your minor children in the event both parents die.

	Person 1	Person 2
First		
Second		
Third (optional)		