

Quote: _____
Down Payment: _____
Payment Plan: _____
Attorneys Initials: _____

ESTATE PLANNING INTAKE

Name: _____

ADDRESS: _____

Phone: _____ **Alt:** _____

Email: _____ **DATE OF BIRTH:** _____

SSN: _____

1. Are you needing a Will, POA, and Living Will: _____

2. Do you already have a Will, POA, or Living Will, we need copies if so: _____

3. Who will be your executor and POA: _____

4. Please list all assets and how they will be distributed: _____

5. Are there any minor child(ren): _____

**** FOR IN-OFFICE USE ONLY:**

Consultation notes: _____

