



ESTATE PLANNING INTAKE FORM

Client Name(s): _____

Name of Trust: _____

Address: _____

Marital Status: _____

Children: *(Please specify whether each child is from a current or prior relationship or marriage, including D.O.B. for each child)*

Guardians: *(Who would you like to serve as guardian(s) of your children after you pass?)*

Successor Trustees: *(You and our spouse, if married, will be the initial trustees; list who you would like to serve as successor trustees upon your death or incapacity. If you appoint co-trustees, may they act independent of the other or must they act together?)*



Power of Attorney: *(Who would you like to act upon your behalf regarding financial and other matters upon your incapacity. If you appoint co-attorneys in fact, may they act independent of the other or must they act together?)*

Healthcare Proxy: *(Who would you want to act on your behalf regarding your medical decisions? If you appoint co-healthcare proxies, may they act independent of the other or must they act together?)*

Distribution of the Trust: *(When, how, and to whom do you want your Trust assets distributed? Do you want to set requirements for a beneficiary to receive their distribution? Do you have any beneficiaries with special needs or who are minors? Are there any organizations or charities that you would like to include as a beneficiary?)*



Retirement, Stocks, & Other Investment Accounts

Type of Account: _____

Broker and Account No.: _____

Estimated Value: _____

Name(s) in which account is titled: _____

Currently named beneficiaries: _____

Type of Account: _____

Broker and Account No.: _____

Estimated Value: _____

Name(s) in which account is titled: _____

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Name(s) in which account is titled: _____

Currently named beneficiaries: _____

Type of Account: _____

Broker and Account No.: _____

Estimated Value: _____

Name(s) in which account is titled: _____

Currently named beneficiaries: _____



Bank Accounts

Type of Account: _____

Bank and Account No.: _____

Estimated Value: _____

Name(s) in which account is titled: _____

Currently named beneficiaries: _____

Type of Account: _____

Bank and Account No.: _____

Estimated Value: _____

Name(s) in which account is titled: _____

Currently named beneficiaries: _____

Type of Account: _____

Bank and Account No.: _____

Estimated Value: _____

Name(s) in which account is titled: _____

Currently named beneficiaries: _____

Type of Account: _____

Bank and Account No.: _____

Estimated Value: _____

Name(s) in which account is titled: _____

Currently named beneficiaries: _____



Real Property (Real Estate and Mineral Interests)

Address: _____

Legal Description (or attach deed): _____

Estimated Value: _____

Name(s) in which property is titled: _____

Address: _____

Legal Description (or attach deed): _____

Estimated Value: _____

Name(s) in which property is titled: _____

Address: _____

Legal Description (or attach deed): _____

Estimated Value: _____

Name(s) in which property is titled: _____



Business or Corporate Entities

Name of Entity _____

Your Interest in the Entity: _____

Name of Entity _____

Your Interest in the Entity: _____

Name of Entity _____

Your Interest in the Entity: _____

Name of Entity _____

Your Interest in the Entity: _____

Name of Entity _____

Your Interest in the Entity: _____



Vehicles & Titled Personal Property

Make/Model/Year: _____

VIN No.: _____

Name(s) on Title: _____

Make/Model/Year: _____

VIN No.: _____

Name(s) on Title: _____

Make/Model/Year: _____

VIN No.: _____

Name(s) on Title: _____

Make/Model/Year: _____

VIN No.: _____

Name(s) on Title: _____

Make/Model/Year: _____

VIN No.: _____

Name(s) on Title: _____