



# ESTATE PLANNING INTAKE SHEET (SHORT FORM)

Please complete this form and bring it with you to your appointment. All information is confidential.

DOUGLAS LAW OFFICE

How did you hear about us?  Referral  Website  Seminar  Other: \_\_\_\_\_

A. Your Full Name: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

City & St.: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Hm / Cell: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Email: \_\_\_\_\_

	You	Spouse
Single, Married, Divorced, Widowed, Life Partner?		
Gender (Male or Female)		
Are you a U.S. Citizen?		

B. Children's Full Legal Name Birthdate Age (Biological, Step, Adopted)

Children's Full Legal Name	Birthdate	Age	(Biological, Step, Adopted)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

C. Guardian: Who would you like to serve as guardian (back-up parent for your minor children)?

Name: \_\_\_\_\_ Relationship \_\_\_\_\_ State \_\_\_\_\_

D. Power of Attorney: Who should make financial decisions for you if you are unable to do so?

Name: \_\_\_\_\_ Relationship \_\_\_\_\_ State \_\_\_\_\_

E. Medical Care: Who would you want to make health care decisions for you if you are unable to do so?

Name: \_\_\_\_\_ Relationship \_\_\_\_\_ State \_\_\_\_\_

F. Things to think about:

- (1) Who will serve as executor of your will (or successor trustee of your trust)?
- (2) Who will be your ultimate beneficiary if all your descendants predecease you?
- (3) Whether you want to make a specific distribution (i.e., church, niece, charity),
- (4) Whether you want to make provisions for cremation or organ donation, and
- (5) The names and addresses of three people who you want contacted in the event of an emergency.

F. Total Est. Value of Assets: \$ \_\_\_\_\_ - Liabilities: \$ \_\_\_\_\_ = Net: \$ \_\_\_\_\_  
(e.g., house, car, bank accounts, life insurance) - (e.g., mortgage, debt)

G. Special concerns or questions that you want to discuss with Attorney Douglas: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Please bring an extra copy of your real property deed and tax assessment. Should you choose to retain the Douglas Law Office to prepare your estate planning documents, you will be tasked to provide more particular information about your assets, including such things as the location of your accounts, account numbers, and specific beneficiary designations. It can be a tedious process to gather and organize all this information. Your attention to this will be appreciated by your heirs and this office. Thank you.**

Appointment Date: \_\_\_\_\_ Time: \_\_\_\_\_ Location: \_\_\_\_\_