



## ESTATE PLAN INTAKE

- Married
- Unmarried

- Divorced
- Widowed

Full Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Spouse's name (if applicable): \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_ County: \_\_\_\_\_

Cell number: \_\_\_\_\_ Email: \_\_\_\_\_

Who recommended you to our firm? \_\_\_\_\_

### ASSET LIST

Homestead and Investment/Personal Use Real Estate	Owner	Value	Mortgage (Y/N)
1.			
2.			
3.			

Bank Accounts/Money Markets/CDs	Owner	Value
1.		
2.		
3.		
4.		
5.		

Stocks/Options/Brokerage/Non-Retirement Accounts	Owner	Value
1.		
2.		
3.		
4.		
5.		

IRA/401K/Annuities	Owner	Beneficiary Designation	Value
1.			
2.			
3.			
4.			

Life Insurance Policies	Owner	Beneficiary Designation	Value
1.			
2.			

Vehicles/Personal Property	Owner	Value
1.		
2.		

Notes Payable to You:	Owner	Value
1.		
2.		

### ADDITIONAL QUESTIONS

- Do you have any former estate planning documents?
- Do you have any minor children? If so, how many? \_\_\_\_\_
- Do you have any children from a previous marriage?
- Are there any non-family individuals you are supporting?
- Is there anyone with special needs that you financially support?

Y	N

Please list any additional information:

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