Please answer the following questions as best you can. If you get stuck on any questions, just leave them blank. You can discuss your questions during your appointment with Attorney Jackson. If you need more room for any of the sections, feel free to use the last sheet of paper included with this form.

**When you are finished with the form, please bring it with you to your appointment.**

Today’s Date

**Are you an existing client?**  Yes No

**How did you find us?**

**Your Information:**

|  |  |
| --- | --- |
| First Name: | Nickname: |
| Last Name: | Middle Initial: Suffix: |
| Age: Pronouns: He/him She/her They/them | |
| Cell Phone: | Home Phone: |
| Are you a U.S. Citizen? Yes No | Are you a U.S. Veteran? Yes No |
| Email Address: | |
| Street Address: | |
| City: | State: |
| Zip Code: | County: |
| Mailing Address (if different): | |
| Primary Residence: Own Your Home Rent Home Home is on rented land | |
| Occupation: | Retired? Yes No |
| If Yes, what was your occupation before retirement? | |
| Are you: Single Married Engaged Domestic Partner Divorced  **NOTE: If you have a spouse or domestic partner, you only need to fill out one (1) intake form, even if you keep finances separate.** | |
| If married, date of marriage: Are you a widow(er)? Yes No | |
| If Yes, spouse’s Name and date of death: | |

**Spouse/Partner Information:**

|  |  |
| --- | --- |
| This person is my (please circle one): Spouse / Partner | |
| First Name: | Nickname: |
| Last Name: | Middle Initial: Suffix: |
| Age: Pronouns: He/him She/her They/them | |
| Cell Phone: | Home Phone: |
| Are they a U.S. Citizen? | Are they a U.S. Veteran? |
| Email Address: |  |
| Street Address: Same as above | |
| City: | State: |
| Zip Code: | County: |
| Mailing Address (if different): | |
| Occupation: | Retired? Yes No |
| If Yes, what was their occupation before retirement? | |

**Special Needs Information or Significant Health Issues:**

If you or any of your family member(s) have special needs or significant health issues, please briefly describe:

|  |
| --- |
|  |

**Existing Documents:**

Please mark the box for each of the documents you, or your spouse, have previously signed; and, **provide us with copies.**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Health Care Proxy | Advance Directive | HIPAA Release | Durable Power of Attorney | Will | Trust |
| You |  |  |  |  |  |  |
| Spouse |  |  |  |  |  |  |

**Children’s Information:**

**Child 1:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Parent’s Name(s): | | | | |
| First Name: | | MI: | Last Name: Suffix: | |
| Age: | DOB: | | | Occupation: |
| Email Address: | | | | |
| Cell Phone: | | | | Home Phone: |
| Street Address: | | | | |
| City: | | | | State: |
| Zip Code: | | | | County: |
| Mailing Address (if different): | | | | |
| Name of Spouse: | | | | Spouse Cell Phone: |
| Names/Ages of their Children: | | | | |

**Child 2:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Parent’s Name(s): | | | | |
| First Name: | | MI: | Last Name: Suffix: | |
| Age: | DOB: | | | Occupation: |
| Email Address: | | | | |
| Cell Phone: | | | | Home Phone: |
| Street Address: | | | | |
| City: | | | | State: |
| Zip Code: | | | | County: |
| Mailing Address (if different): | | | | |
| Name of Spouse: | | | | Spouse Cell Phone: |
| Names/Ages of their Children: | | | | |

**Child 3:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Parent’s Name(s): | | | | |
| First Name: | | MI: | Last Name: Suffix: | |
| Age: | DOB: | | | Occupation: |
| Email Address: | | | | |
| Cell Phone: | | | | Home Phone: |
| Street Address: | | | | |
| City: | | | | State: |
| Zip Code: | | | | County: |
| Mailing Address (if different): | | | | |
| Name of Spouse: | | | | Spouse Cell Phone: |
| Names/Ages of their Children: | | | | |

**Do you, or your spouse, have additional children?**  Yes No

If yes, please provide their information in the space provided on the last page.

**Do you, or your spouse, have any deceased children?** Yes No

If Yes:

1. Parent’s Name(s):
2. Child’s Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Date of Death: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Names/Ages of their Children: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Children’s Guardianship:**

Are any of the child(ren) under the age of 18? Yes No

Do you have a child with special needs? No Yes If yes: Under 18 Over 18

If No, for both questions, please skip to the next section titled “Health Care Proxy”.

If Yes, know that the Will can name the Guardian of minor or special needs children in case of death or disability of parent(s). There are two types of Guardianships available:

1. Guardianship of the person (who the child(ren) will live with); and,
2. Guardianship of the estate (who maintains the child(ren)’s money).

A different person for each type of Guardianship can be named, or the same person can be named for both.

Who would you, or your spouse, like to name?

* Guardianship of the Minor/Special Needs Child: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Guardianship of the Estate of the Minor/Special Needs Child: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Health Care Proxy for:** (NAME)

Naming a proxy here means that this individual will be the one to speak to a care provider on your behalf, should you be unable to.

Please name two (2) or more agents.

**Agent 1:**

|  |  |  |
| --- | --- | --- |
| Relationship: | |  |
| First Name: | Middle Initial: Suffix: | | |
| Last Name: | | | |
| Address: | | | |
| Cell phone: | Home Phone: | | |

**Agent 2:** (in case Agent 1 cannot serve)

|  |  |  |
| --- | --- | --- |
| Relationship: | |  |
| First Name: | Middle Initial: Suffix: | | |
| Last Name: | | | |
| Address: | | | |
| Cell phone: | Home Phone: | | |

**Agent 3:** (in case Agent 2 cannot serve)

|  |  |  |
| --- | --- | --- |
| Relationship: | |  |
| First Name: | Middle Initial: Suffix: | | |
| Last Name: | | | |
| Address: | | | |
| Cell phone: | Home Phone: | | |

**Health Care Proxy for:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_

(NAME)

Naming a proxy here means that this individual will be the one to speak to a care provider on your behalf, should you be unable to.

Please name two (2) or more agents.

**Agent 1:**

|  |  |  |
| --- | --- | --- |
| Relationship: | |  |
| First Name: | Middle Initial: Suffix: | | |
| Last Name: | | | |
| Address: | | | |
| Cell phone: | Home Phone: | | |

**Agent 2:** (in case Agent 1 cannot serve)

|  |  |  |
| --- | --- | --- |
| Relationship: | |  |
| First Name: | Middle Initial: Suffix: | | |
| Last Name: | | | |
| Address: | | | |
| Cell phone: | Home Phone: | | |

**Agent 3:** (in case Agent 2 cannot serve)

|  |  |  |
| --- | --- | --- |
| Relationship: | |  |
| First Name: | Middle Initial: Suffix: | | |
| Last Name: | | | |
| Address: | | | |
| Cell phone: | Home Phone: | | |

**Yearly Income:**

List each source (e.g. salary, social security, pension, etc.) and amount.

|  |  |  |  |
| --- | --- | --- | --- |
|  | You | Spouse | Total |
| Wages | $ | $ | $ |
| Social Security | $ | $ | $ |
| Pension | $ | $ | $ |
| Interest/Dividends | $ | $ | $ |
| RMD\* | $ | $ | $ |
| Rental Income \*\* | $ | $ | $ |

**\*RMD, Required Minimum Distribution**

**\*\*Rental Income = Gross Receipts – Expenses**

**Do you, or your spouse, have Long-term Care Insurance?**

Yes No

If yes, what is the daily rate and length of time for coverage (for each your spouse and yourself, if applicable)?

**Pets:**

Through the Will or Trust, a caretaker can be named and/or an allocation of funds can be set aside for your pets’ lifetime care (e.g. vet bills, housing, comfort, food, etc.), when you can no longer care for them properly or upon your death.

Do you, or your spouse, wish to include pets in your Estate Plan? Yes No  Maybe

If Yes, please briefly describe (e.g. type of animal, caretaker’s name, allocated funds, etc.)

|  |
| --- |
|  |

|  |
| --- |
|  |
|  |

**Real Estate:**

Do you, or your spouse own a home? If so,list the tax assessed value or appraised value.

HOME:

|  |  |  |
| --- | --- | --- |
| Property Address: | | |
| Name of Owner(s): | | |
| Value: $ | Payoff Amt.: $ | Equity\*: $ |
| The value you provided is (check one): Tax Assessed Appraised | | |

*\*Equity = Fair Market Value - Mortgage*

OTHER REAL ESTATE: (Please list each additional property)

|  |  |  |
| --- | --- | --- |
| Property Address: | | |
| Name of Owner(s): | | |
| Value: $ | Payoff Amt.: $ | Equity\*: $ |
| The value you provided is (check one): Tax Assessed Appraised | | |

*\*Equity = Fair Market Value - Mortgage*

OTHER REAL ESTATE:

|  |  |  |
| --- | --- | --- |
| Property Address: | | |
| Name of Owner(s): | | |
| Value: $ | Payoff Amt.: $ | Equity\*: $ |
| The value you provided is (check one): Tax Assessed Appraised | | |

*\*Equity = Fair Market Value - Mortgage*

**Non-Real Estate Assets\* (such as retirement funds, annuities, and bank accounts):**

Please list each asset.

Also identify the name(s) on the asset, and if held individually or jointly (example: “Joint w/brother, Dan”).

Assets can include: bank accounts; retirement accounts; life insurance policy; stocks/bonds/mutual funds; annuities etc.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Type of Asset | Name of Institution | Name(s) on Account | Individual or Joint  (if Joint, list with whom) | Current Value / Equity | Beneficiaries listed, in order | If bank account, is it payable upon death? |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

**TOTAL VALUE: $**

\*If there are additional assets, please feel free to provide the requested information for each asset on the last page.

**Life Insurance:**

Please list all life insurance policy(ies) and the requested information. Feel free to use additional paper if there are more than two (2).

|  |  |  |
| --- | --- | --- |
|  | POLICY | POLICY |
| Company Name |  |  |
| Owner(s) |  |  |
| Whole Life or  Term? |  |  |
| Beneficiary(ies) |  |  |
| Cash Surrender Value |  |  |
| Death Benefit |  |  |

**Debts:**

Please list all debts with the requested information. Feel free to use additional paper if there are more than four (4).

|  |  |
| --- | --- |
| Creditor | Debt Amount |
|  |  |
|  |  |
|  |  |
|  |  |

**TOTAL DEBT: $**

**Additional Information:**

If any additional information is needed, please add it here:

|  |
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Version 10.24.24