

Type of Case

Power of Attorney

Wills

Other

Office Use Only

Initial Contact _____

Initial Letter _____

First Scheduled Visit _____

Second Scheduled Visit _____

Law Office of A. Green Estate Planning Intake Sheet

The Law Office of A. Green is a service-based business. All services will be charged to the client and prompt payment is expected. We accept cash, credit cards, and checks.

2646 South Loop West, Suite 130A

Houston Texas 77054

Phone: (832)-844-1677

Fax: (832) 787-1167

Email: agreenteam@lawofficegreen.com

CLIENT INFORMATION

Client's Full Legal Name: _____

Spouse's Full Legal Name: _____

Street Address: _____

City, State, and Zip: _____

County of Residence: _____

Telephone: Home: _____ Work: _____ Cell: _____

Facsimile: _____

E-Mail: _____

Marital status: _____ Date of Marriage: _____

SSN: Client _____ Spouse _____

Date of birth: Client _____ Spouse _____

Citizenship: Client _____ Spouse _____

Have you or your spouse been married previously? _____

Do you have current Wills? ____ If yes, please bring all originals to our appointment.

FAMILY INFORMATION

Please list the legal names and birthdays of all of your children, and whether they have children of their own. Please also include the names of any *deceased* children and whether they had any children.

Husband's Children	Date of Birth	# and Age of Grandchildren
_____	_____	_____
_____	_____	_____

Wife's Children	Date of Birth	# and Age of Grandchildren
_____	_____	_____
_____	_____	_____

ESTATE PLANNING INFORMATION

A **personal representative, or executor**, is the person who manages your assets after your death, coordinates with the probate court, and distributes your estate according to your Will. Who would you like to be your personal representative?

<u>Legal Name</u>	<u>Relationship</u>	<u>Address (if not a relative)</u>
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

A **trustee** is the person who will manage assets after your death for any minor children, grandchildren, or disabled beneficiaries of your estate, or, for your surviving spouse, as applicable. A trustee may also be appointed to manage your assets during your own lifetime in certain circumstances. Who should be your trustee?

<u>Legal Name</u>	<u>Relationship</u>	<u>Address (if not a relative)</u>
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

A **guardian** is the person who will take care of your minor children, after your death. Who should be the guardian of your minor children?

<u>Legal name</u>	<u>Relationship</u>	<u>Address (if not a relative)</u>
1. _____	_____	_____

2. _____

3. _____

Exclude a former spouse? _____ Name: _____

A General Durable Power of Attorney authorizes someone to act on your behalf for financial and medical decisions during your lifetime. Who would you like to act on your behalf? (You may separate out medical and financial powers).

Legal name	Relationship	Address (if not a relative)
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

A **living will**, also called an “Advance Directive for Medical/Surgical Treatment” is a document in which you specify in advance whether or for how long you would like life support and artificial nutrition and hydration continued under certain circumstances. Do you want a living will? Husband _____ Wife _____

The beneficiaries who are designated on your various investments, retirement accounts, and life insurance policies should be coordinated with your Wills. Do you have retirement accounts, life insurance policies, annuities, or other accounts that need beneficiary designation forms directing that these assets should pass upon your death in harmony with you Will? _____

Please note if any special family circumstances are applicable:

- Do you want to disinherit anyone? _____
- Is anyone likely to contest your Will? _____
- Is anyone on governmental assistance? _____
- Does anyone have special needs, disabilities, or addictions? _____
- Will anyone need to enter a nursing home soon? _____
- Does anyone have creditor problems? _____
- Is divorce a concern for anyone? _____

Other: _____

Please list any special financial circumstances:

Continuing obligations from a prior divorce? _____

Prenuptial or other marital agreement? _____

Have you or your spouse ever filed gift tax returns? _____

Non-Colorado assets? _____

Oil, Gas, Mineral Interests? _____

Agricultural interests? _____

Water rights? _____

Time-share or vacation home? _____

Family business? _____

Are you the beneficiary of any existing trust? _____

Total combined estate close to or over \$5 million? _____

Do you have a long-term care policy? _____

If yes, what are the benefits payable? _____

Other: _____

DISTRIBUTION OF ESTATE:

1. Would you like to make gifts of specific assets under your Will? If so, please describe:

2. Please describe how you would like the rest your estate distributed.

3. If any of the above beneficiaries are deceased, who would you want to be your contingent beneficiary or beneficiaries?

4. The Will's trust provision allows your Personal Representative to hold the gift to any beneficiary in trust until he or she reaches age 25. Please indicate if you would like the age of trust dissolution and outright distribution to be different.

SUMMARY OF ASSETS

Please list all of your assets on the below form. You may use "ballpark" figures, but it is important that this list is filled out completely, including an indication of the ownership of each asset.

<u>ASSETS</u>	<u>HUSBAND</u>	<u>WIFE</u>	<u>JOINT</u>	<u>TENANTS IN COMMON</u>
<u>REAL ESTATE</u> Home				
Other Real Estate				
<u>CASH AND SECURITIES</u> Cash and Checking Accounts				
Savings Accounts				

CDs, T-Bills, etc.				
Stocks/Bonds/Mutual Funds				
U.S. Savings Bonds				
Other				
<u>PERSONAL PROPERTY</u> Cars				
Household Furnishings				
Jewelry				
Recreation Equipment				
Collectibles				
Other				
<u>OTHER</u> Life Insurance				
Pension Death Benefits - Circle: IRA, KEOGH, Profit Sharing, Other				
Annuities				

Business Interests				
Loans Receivable				
Oil, Gas and Other Minerals				
Prospective Inheritances				
<u>TOTAL ASSETS</u>				
<u>LIABILITIES</u>				
<u>MORTGAGES</u> Home				
Other Real Estate				
<u>OTHER LOANS</u> Cars				
Other				
Unsecured Debts				

<u>TOTAL LIABILITIES</u>				
<u>NET ESTATES</u>				
<u>GRAND TOTAL</u>				
<u>YEARLY INCOME</u>				

Is there anything else you would like our office to know?

HOW DID YOU HEAR ABOUT US?

Avvo Google Craigslist Facebook

Event: Let us know which one so we can honor any discounts. _____

Word of Mouth: Let us know who so we can send a thank you. _____

Other: Let us know _____