ESTATE PLAN INTAKE FORM

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Date	
Referred By	

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CLIENT	
Name (Driver License)	
Nicknames	
Email - Personal	
Email - Work	
Phone - Cell	
Phone - Home	
Phone - Work	
Phone - Fax	
Address - Home	
Address - Work	
Occupation	
Age	
Years in Florida	
U.S. Citizen?	

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CLIENT'S FAMILY		
	Name and Address	**Age Under 18?**
Spouse		
Children		
Parents		
Brothers & Sisters		
Other		

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CLIENT'S SPOUSE'S FAMILY		
	Name and Address	**Age Under 18?**
Children		
Parents		
Brothers & Sisters		
Other		

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CLIENT'S ASSETS		
	Description	**$ Value**
Homestead		
Other Real Estate		
Bank Accounts		
IRA and Retirement Accounts		
Investment Accounts		
Businesses		
Life Insurance		
Vehicles		
Jewelry, Furniture, Etc.		
Other		

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CLIENT'S LIABILITIES		
	Name and Address	**$ Amount**
Mortgage Loans		
Vehicle Loans		
Bank Loans		
Divorce, Marital Prenuptial, Postnuptial		
Other		

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CLIENT'S ADVISORS	
	Name and Address
Accountants	
Brokers	
Insurance Agents	
Other	

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REPRESENTATIVES	Who does client want to act for client in case of client death or incapacity?
	Name and Address
Personal Representative	
Alternate Personal Representatives	
Trustee	
Alternate Trustees	
Guardian	
Alternate Guardians	
Health Care Surrogate	
Alternate Health Care Surrogates	
Other	

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DISPOSITION ON DEATH	**Who does client want to leave assets to at death?**
	Item, Beneficiary Name, and Address
Homestead Real Estate - Primary Beneficiaries	
Homestead Real Estate - Alternate Beneficiaries	
Other Real Estate - Primary Beneficiaries	
Other Real Estate - Alternate Beneficiaries	
Tangible Personal Property - Primary Beneficiaries	
Tangible Personal Property - Alternate Beneficiaries	
Other Specific Gifts	
All Remaining Assets (Residuary)	

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TRUSTS	**If a beneficiary is under the age of 18 years, does client want his or her share held in trust?**
Trustees	
Alternate Trustees	
Pay income beginning at age 21?	
Pay distributions of principal in thirds at ages 25, 30 and 35?	
Other	

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EXISTING DOCUMENTS			
	Copy Attached?	**Dates**	**Who Has Original**
Wills			
Codicils			
Separate Writings (Tangible Property)			
Trust Agreements, Amendments, Restatements			
Divorce, Marital Prenuptial, Postnuptial			
Life Insurance Statements & Beneficiaries			
IRA and Retirement Account Statements & Beneficiaries			
Bank, Investment, and Financial Account Statements			
Real Estate Tax Bills, Deeds, Title Insurance, Surveys			
Other Documents			

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ESTATE PLAN DOCUMENTS	
Will	
Living Trust	
Durable Power of Attorney	
Living Will	
Designation of Health Care Surrogate	
Designation of Health Care Surrogate for Minor	
Declaration of Preneed Guardian	
Declaration of Preneed Guardian for Minor	
Beneficiary Designation for Life Insurance, IRA, Retirement Accounts, Etc.	
Other	

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