

CONFIDENTIAL

ESTATE PLANNING QUESTIONNAIRE

**Law Office of
James W. Martin, P.A.
Attorney at Law**
St. Petersburg, Florida 33705
www.jamesmartinpa.com
Email jim@jamesmartinpa.com
Phone (727) 821-0904

If you want Mr. Martin to consider taking your case, please fill out this questionnaire and email it to **jim@jamesmartinpa.com** . Please consider the following:

- Submitting a questionnaire does not create an attorney-client relationship with Mr. Martin.
- No attorney's fee is incurred by having the questionnaire read by Mr. Martin.
- An attorney-client relationship is created only if and when Mr. Martin and the potential client enter into a written fee agreement and the potential client pays the advance fee payment to Mr. Martin's IOTA trust account.
- Communications between attorneys and their clients and potential clients are confidential and privileged from disclosure, whether in person or by phone, email, or otherwise. The privilege could be lost or waived if the client or potential client discloses the communication to someone else. Therefore, please keep your communications with Mr. Martin confidential.

Date	
Referred By	

POTENTIAL CLIENT	
Your Name (as it appears on your driver license)	
Phone Number	
Email Address	
Mailing Address	

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ESTATE PLAN DOCUMENTS	Please indicate the documents you want to consider.
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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