

## Estate Planning Consult In-Take Sheet

(Single)

Date of Interview: \_\_\_\_\_

Location:             Boca             Boynton      Other: \_\_\_\_\_

Interviewer: \_\_\_\_\_

### GENERAL INFORMATION

1	<b>Client Full Name</b>	
2	<b>Client Soc Sec Number</b>	
3	<b>Client DOB</b>	
4	<b>Client Age</b>	
5	<b>Client Home Address</b>	
6	<b>Client City, State, Zip</b>	
7	<b>Client County</b>	
8	<b>Client Home Phone</b>	
9	<b>Client Cell Phone</b>	
10	<b>Client Work Phone</b>	
11	<b>Client Email</b>	
12	<b>Client Citizenship</b>	
13	<b>Client Veteran OR Widow of Veteran</b>	
14	<b>Client Widow of Veteran</b>	

15	<b>Client Marital Status</b>	<b>Married</b>
16	<b>Previous Marriage</b>	Yes _____ No _____ If Yes, divorce date _____
	<b>Children from previous marriage?</b>	Yes _____ No _____ If Yes:
	<i>(If answered No in #15 above mark N/A)</i>	<u>Full name of each child age, city and state:</u> 1. 2. 3.

17	<b>Client Current Will</b>	Yes _____ No _____ Date _____
18	<b>Client Trusts</b>	Yes _____ No _____ Date _____
19	<b>Client DPOA</b>	Yes _____ No _____ Date _____
20	<b>Client HS Surrogate</b>	Yes _____ No _____ Date _____
21	<b>Client Living Will</b>	Yes _____ No _____ Date _____

22	<b>Disabled Children or Grandchildren</b>	Yes _____ No _____
----	---	--------------------

**LISTING OF ASSETS**

Asset	You	Joint	TOTAL	Comments
<b>Primary Residence</b>				
1 <sup>st</sup> Mortgage				
<b>Additional Residence</b>				
1 <sup>st</sup> Mortgage				
<b>Vehicle 1</b>				
Owed on Car:				
<b>Vehicle 2</b>				
Owed on car				
<b>Personal Property</b>				
<b>BANK – Savings</b>				
<b>BANK Checking</b>				
<b>Life Insurance Cash Value</b>				
<b>Cemetery Plot</b>				
<b>Funeral Plan</b>				
<b>Burial Fund</b>				
<b>Annuities</b>				
<b>Bonds</b>				
<b>401(k)</b>				
<b>Stocks</b>				
<b>Bus Assets/Rental Prop</b>				
<b>TOTALS</b>				

**GROSS MONTHLY INCOME**  
*(Current Market value date of Meeting)*

Source	TOTAL
GROSS Social Security (Retirement)	
IRA (Traditional)	
IRA (Roth)	
Pension	
CD Income	
VA Pension Aid Attendance	
VA Compensation	
401(k)	
Annuity Income	
Interest	
Dividend	
<b>Gross Total Income</b>	