

Estate Planning
Consult In-Take Sheet
(Married)

Date of Interview: _____ Location: _____ Boynton Other: _____

GENERAL INFORMATION

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

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

17	Client Current Will	Yes _____ No _____ Date _____
18	Client Trusts	Yes _____ No _____ Date _____
19	Client DPOA	Yes _____ No _____ Date _____
20	Client Healthcare Surrogate	Yes _____ No _____ Date _____
21	Client Living Will	Yes _____ No _____ Date _____

22	Disabled Children or Grandchildren	Yes _____ No _____
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SPOUSE INFORMATION

23	SPOUSE NAME	
24	Spouse previously Married	Previous Marriage? Date of Divorce? Children Previous Marriage?
25	SS #	
26	DOB	
27	Age	
28	Address	
29	City, State Zip	
30	County	
31	Phone	Cell Phone: Home Phone: Work Phone :
32	Spouse Citizenship	Yes _____ No _____
33	Spouse Veteran	Yes _____ No _____

34	Spouse previous marriages?	Yes _____ No _____ If yes date of divorce _____
	Spouse Children from previous marriage?	Yes _____ No _____ If Yes: <u>Full name of each child age, city and state:</u> 1. 2. 3.

35	Spouse Current Will	Yes _____ No _____ Date _____
36	Spouse Trusts	Yes _____ No _____ Date _____
37	Spouse DPOA	Yes _____ No _____ Date _____
38	Spouse Healthcare Surrogate	Yes _____ No _____ Date _____
39	Spouse Living Will	Yes _____ No _____ Date _____

40	Disabled Children or Grandchildren	Yes _____ No _____
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CHILDREN OF YOUR CURRENT MARRIAGE

Full Name	Age	Address City State Phone: Email:

IX. GROSS MONTHLY INCOME
(Current Market value date of Meeting)

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