



# ESTATE PLANNING INTAKE

## PERSONAL INFORMATION

	<i>First Name</i>	<i>Middle Name</i>	<i>Last Name</i>
You			
Your Spouse			

Home Address	

Have you ever made a will before?	<input type="checkbox"/> No. <input type="checkbox"/> Yes, on ___/___/___.
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## CHILDREN

	<i>First Name</i>	<i>Middle Name</i>	<i>Last Name</i>	<i>Date of Birth</i>
Child 1				___/___/___
Child 2				___/___/___
Child 3				___/___/___
Child 4				___/___/___
Child 5				___/___/___

## REAL ESTATE

<i>Address</i>	<i>Type</i>	<i>Name(s) on Deed</i>
	<input type="checkbox"/> House <input type="checkbox"/> Land <input type="checkbox"/> Condo <input type="checkbox"/> Other	
	<input type="checkbox"/> House <input type="checkbox"/> Land <input type="checkbox"/> Condo <input type="checkbox"/> Other	
	<input type="checkbox"/> House <input type="checkbox"/> Land <input type="checkbox"/> Condo <input type="checkbox"/> Other	
	<input type="checkbox"/> House <input type="checkbox"/> Land <input type="checkbox"/> Condo <input type="checkbox"/> Other	
	<input type="checkbox"/> House <input type="checkbox"/> Land <input type="checkbox"/> Condo <input type="checkbox"/> Other	

### SPECIFIC DEVICES

Are there any specific items that you want to give to a certain person?		<input type="checkbox"/> No, I want to leave all my property to the same person. <input type="checkbox"/> Yes, and I have listed them below:
Item 1		
Item 2		
Item 3		
Item 4		

### GENERAL DEVISE

Who do you want to receive the rest of your property?		<input type="checkbox"/> My spouse. <input type="checkbox"/> My children. <input type="checkbox"/> Someone else, who I have listed below:
<i>First Name</i>	<i>Middle Name</i>	<i>Last Name</i>
If that person isn't available, who is your second choice to receive the rest of your property?		<input type="checkbox"/> My spouse. <input type="checkbox"/> My children. <input type="checkbox"/> Someone else, who I have listed below:
<i>First Name</i>	<i>Middle Name</i>	<i>Last Name</i>

### PERSONAL REPRESENTATIVE

Who do you want to serve as the personal representative (executor) of your will?		<input type="checkbox"/> My spouse. <input type="checkbox"/> Someone else, who I have listed below:
<i>First Name</i>	<i>Middle Name</i>	<i>Last Name</i>
If that person can't serve as personal representative, who is your second choice?		
<i>First Name</i>	<i>Middle Name</i>	<i>Last Name</i>

### OTHER INSTRUCTIONS

If you have any special instructions or questions about your will, please write them in the space provided below.
