INTAKE - ESTATE PLANNING

CLIENT INFORMATION

	CLIENT #1	CLIENT #2
Full Legal Name		
Gender		
Date of Birth		
Home Address		
Phone Number		
Email Address		
Employer / Retired		
Marital Status		
Date of Marriage		
Existing Estate Plan?		

CHILDREN INFORMATION

Full Legal Name	Gender	Date of Birth	Child Of:
			Client 1 ☐ Client 2 ☐ Joint ☐
			Client 1 ☐ Client 2 ☐ Joint ☐
			Client 1 ☐ Client 2 ☐ Joint ☐
			Client 1 ☐ Client 2 ☐ Joint ☐

ADVISORS INFORMATION

Attorney Name:		Firm Name:	
Attorney Phone:		Attorney Email:	

Financial Advisor Name:		Firm Name:	
Financial Advisor Phone:		Financial Advisor Email:	

Accountant Name:		Firm Name:	
Accountant Phone:		Accountant Email:	

Insurance Agent Name:		Firm Name:	
Insurance Agent Phone:		Insurance Agent Email:	

HEDGE LIFE LAW

FINANCIAL INFORMATION

ASSETS	**CLIENT #1**	**CLIENT #2**	**JOINT**
Cash (checking/savings):			
Personal Property:			
Retirement Accounts:			
Investment Accounts:			
Life Insurance (cash value):			
Life Insurance (term):			
Annuities:			
Principal Residence:			
Real Estate (RE2):			
Real Estate (RE3):			
Automobiles:			
Closely Held Business:			
Notes Receivable:			
529 Plan:			
Other:			
Other:			
Other:			
TOTAL ASSETS			
LIABILITIES			
Mortgage (principal residence):			
Mortgage (RE2):			
Mortgage (RE3):			
Auto Loans:			
Credit Cards:			
Other:			
TOTAL LIABLITIES			
NET			

PLANNING CONSIDERATIONS

Personal Representative: The person responsible for the administration of your estate after you die.

	CLIENT #1	CLIENT #2
1st Choice		
2nd Choice		
3rd Choice		

Guardians for Minor Children: The person responsible for the physical wellbeing of your minor children.

	CLIENT #1	CLIENT #2
1st Choice		
2nd Choice		
3rd Choice		

Successor Trustee: The person who will manage your trust assets if you become incapacitated or distribute trust assets after you die.

	(SAME FOR BOTH IF MULTIPLE CLIENTS)
1st Choice	
2nd Choice	
3rd Choice	

Describe how you want your beneficiaries to inherit your estate

PLANNING CONSIDERATIONS

Agent: The person who can make financial decisions on your behalf if you become incapacitated.

	CLIENT #1	CLIENT #2
1st Choice		
2nd Choice		
3rd Choice		

Patient Advocate: The person who can make medical and care decisions on your behalf if you become incapacitated.

	CLIENT #1	CLIENT #2
1st Choice		
2nd Choice		
3rd Choice		

Planning Priorities

- ☐ Maintaining control over your assets while you are alive
- ☐ Ensuring your estate is managed well for your children
- ☐ Ensuring the right people care for your children after you die
- ☐ Avoiding probate administration
- ☐ Maximizing tax efficiency
- ☐ Protecting your assets from lawsuits or other creditors
- ☐ Ensuring that your estate plan stays protected in the event you die and your spouse remarries
- ☐ Providing for your favorite charity after you die
- ☐ Transferring your business interest(s) before or after you die
- ☐ Planning for any concerns you may have about your children's lifestyle, marriage, spending habits
- ☐ Other: ____

Notes