

GOODMAN ESTATE LAW, APC

WILLS - TRUSTS - PROBATE

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New Client Questionnaire

This confidential Questionnaire is designed to solicit the information necessary to properly counsel you and prepare your estate plan. This questionnaire is primarily intended to get the ball rolling, and does not need to be fully completed; rather, we just want you to start thinking about answers to the relevant questions. The attorney will take whatever time is necessary to explain the various sections to you, answer any questions, discuss the assets in your estate, and to fully round out any incomplete information necessary to prepare estate planning documents.

We look forward to meeting with you and being of service!

I. Your Information:

- A. Your Name _____ DOB _____
B. Spouse Name _____ DOB _____
C. Address _____
D. Your Cell _____ Spouse Cell _____
E. Your Email _____ Spouse Email _____
F. Children:
 Name _____ DOB _____
 Name _____ DOB _____
 Name _____ DOB _____

II. Beneficiaries - "Who should get your assets when you pass away?"

- A. Name _____ Percentage / Dollar Amount _____
B. Name _____ Percentage / Dollar Amount _____
C. Name _____ Percentage / Dollar Amount _____
D. Name _____ Percentage / Dollar Amount _____
E. Be thinking about backup plans too - if any / all of the above should die before you, who should get their portion instead?

III. Successor Trustees - "Who should be in charge of doing the paperwork and making those distributions?"

- A. First choice _____
B. Second choice _____
C. Third choice _____

IV. Power of Attorney - "If you become incapacitated, who should help handle your finances?"

- A. First choice _____
B. Second choice _____

V. Advance Health Care Directive - "If you become incapacitated, who should be your medical liaison?"

- A. First choice _____
B. Second choice _____