



21815 Oak Park Trails Drive Katy TX 77450  
Tel: 281-646-0644 Fax: 281-676-3758

Date: \_\_\_\_\_

## **Client Information Form (Estate Planning)**

### **Client Information**

First Name \_\_\_\_\_ Middle Name \_\_\_\_\_ Family Name \_\_\_\_\_

Name you prefer to be called \_\_\_\_\_

Date of Birth \_\_\_\_\_ Birthplace \_\_\_\_\_ SSN# \_\_\_\_\_ DL# \_\_\_\_\_

Current Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_

Telephone: Home \_\_\_\_\_ Cell \_\_\_\_\_ Work \_\_\_\_\_

Email \_\_\_\_\_

Best contact to reach you at \_\_\_\_\_

Employer \_\_\_\_\_ Job Title \_\_\_\_\_

Work Address \_\_\_\_\_

Where will you be storing your completed documents? \_\_\_\_\_

### **Marital Information**

Marital Status (Married, Single, Divorced, Widowed?) \_\_\_\_\_

Name of Spouse \_\_\_\_\_

Date of Marriage \_\_\_\_\_ Place of Marriage \_\_\_\_\_

Date of Divorce or Death of Spouse \_\_\_\_\_

Does your spouse require estate planning at this time? \_\_\_\_\_

Do you have any children? \_\_\_\_\_ If yes, how many? \_\_\_\_\_

Please provide the names and contact information of each child:

1. Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Name of other parent \_\_\_\_\_

2. Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Name of other parent \_\_\_\_\_

3. Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Name of other parent \_\_\_\_\_

4. Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Name of other parent \_\_\_\_\_

5. Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Name of other parent \_\_\_\_\_

6. Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Name of other parent \_\_\_\_\_

7. Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Name of other parent \_\_\_\_\_

8. Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Name of other parent \_\_\_\_\_

**Asset Information**

Do you have any of the following assets:

- Life Insurance      Value \$\_\_\_\_\_
- Retirement Plans    Value \$\_\_\_\_\_
- Residence            Value \$\_\_\_\_\_
- Other Real Estate    Value \$\_\_\_\_\_
- Checking Accounts   Value \$\_\_\_\_\_
- Savings Accounts    Value \$\_\_\_\_\_
- Other   Description \_\_\_\_\_ Value \$\_\_\_\_\_
- CDs                    Value \$\_\_\_\_\_
- Brokerages            Value \$\_\_\_\_\_
- Loans to Others      Value \$\_\_\_\_\_
- Businesses            Value \$\_\_\_\_\_
- Vehicles              Value \$\_\_\_\_\_
- Personal Effects      Value \$\_\_\_\_\_

Do you own any real property outside the State of Texas? \_\_\_\_\_

If yes, address \_\_\_\_\_

**Describe topics you want to discuss and how you want your estate to be distributed upon your death**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Do you anticipate someone contesting the terms of your Last Will and Testament? \_\_\_\_\_

If yes, who and why \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Who do you want to name as the **Executor** of your estate?

1<sup>st</sup> Executor

Name \_\_\_\_\_

Relation \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

2<sup>nd</sup> Executor

Name \_\_\_\_\_

Relation \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

3<sup>rd</sup> Executor

Name \_\_\_\_\_

Relation \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

Who do you want to name as the **Guardian** of your minor children?

1<sup>st</sup> Guardian

Name \_\_\_\_\_

Relation \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

2<sup>nd</sup> Guardian

Name \_\_\_\_\_

Relation \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

3<sup>rd</sup> Guardian

Name \_\_\_\_\_

Relation \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

Who do you want to name as the **Trustee** of your trusts (if any)?

1<sup>st</sup> Trustee

Name \_\_\_\_\_

Relation \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

2<sup>nd</sup> Trustee

Name \_\_\_\_\_

Relation \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

3<sup>rd</sup> Trustee

Name \_\_\_\_\_

Relation \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

Who do you want to name your **Agent** on your **Durable Power of Attorney**?

1<sup>st</sup> Agent

Name \_\_\_\_\_

Relation \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

2<sup>nd</sup> Agent

Name \_\_\_\_\_

Relation \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

3<sup>rd</sup> Agent

Name \_\_\_\_\_

Relation \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

