

CLIENT INFORMATION AND BENEFICIARY QUESTIONNAIRE

Client Name & Address:

Name _____ Spouse: _____

Address _____

Preferred phone: _____ E-mail Address _____

Legal Name(s) of Owner(s) of the property (currently on the deed):

Legal Name(s) of the Beneficiaries:

_____	% interest	_____
_____	% interest	_____
_____	% interest	_____
_____	% interest	_____

Are the Beneficiaries married: Yes _____ No _____
 If Yes, will spouse appear on Deed: Yes _____ No _____
 Spouse's Name to appear on Deed:

*Note, unless directed otherwise, the beneficial interest is obtained by Beneficiary and his/her spouse.

If a Beneficiary predeceases you, then (pick one):

1. _____ The interest of the Beneficiary that predeceased the owners shall revert back to the owner/s.
2. _____ The interest of the Beneficiary that predeceased the owner/s shall revert to the remaining Beneficiaries, equally.
3. Other _____

Please be advised we do not conduct research on your property's legal description. We will use the last recorded legal description or the legal description you provide for the document we prepare.

COST OF SERVICES\$500 + \$50 recording fee (all counties); If more than 15 minutes is required during the initial consultation, additional fees will be charged at attorney's hourly rate; if more than 1 hour is required to draft the deed and assist client with questions, then hourly services will be charged.**

*Notary services not provided with fee.