

Estate Signing Intake Form Templates

Professional Intake and Preparation Templates for Estate Signing Professionals

Purpose	Intake Goal
Gather logistical, environmental, and operational information before estate-signing ceremonies.	Reduce avoidable friction by confirming access, documents, witnesses, environment needs, role boundaries, and completion instructions before arrival.

Intake principle: Strong intake is not interrogation. It is calm preparation that helps protect the signer experience, attorney instructions, and operational flow.

1. Basic Appointment Information

Field	Intake Notes
Signer name(s)	
Primary contact name	
Primary contact number	
Email address	
Appointment date and time	
Signing location address	
Alternate access contact	
Preferred confirmation method	

2. Hiring Party / Attorney Information

Field	Intake Notes
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Attorney / firm / hiring party	
Primary contact	
Phone / email	
Matter or file reference if provided	
Special signing instructions	
Who should be contacted for legal questions?	
Who should be contacted for logistics questions?	

3. Document Package Information

Field	Intake Notes
Type of estate documents	
Estimated page count	
Paper-size requirements	
Documents requiring notarization	
Documents requiring witnesses	
Scanbacks required?	
Scanback deadline	
Shipping, pickup, delivery, or courier instructions	
Special printing or handling instructions	

4. Witness Coordination Information

Field	Intake Notes
Witnesses required?	
Number of witnesses required	
Witnesses provided by	
Witness names / contact information	
Witness arrival time	
Witness ID or eligibility considerations to confirm with hiring party	
Additional witness notes	

5. Facility, Healthcare and Accessibility Considerations

Field	Intake Notes
Environment type: hospital / rehab / hospice / assisted living / home / office / other	
Facility name	
Room number or unit	
Visitor registration requirements	
Parking, security, gate, or front desk instructions	
Mobility or accessibility considerations	
Bedside, wheelchair, recliner, or limited-workspace needs	

Expected interruptions or facility schedule concerns	
Facility contact if available	

6. Scheduling and Environmental Notes

Field	Intake Notes
Preferred ceremony pace considerations	
Expected family or caregiver presence	
Potential emotional or family-dynamic considerations	
Workspace limitations	
Lighting or writing-surface needs	
Noise or privacy concerns	
Additional environmental notes	

7. Risk Flag Intake Review

Item	Yes / No / N/A	Notes
Signer may need slower pacing or breaks		
Healthcare or facility access may delay arrival		
Witness details are not fully confirmed		
Instructions are incomplete or unclear		
Family members may be present or highly involved		

Large package or mixed paper sizes		
Scanback or shipping deadline is time-sensitive		
Legal questions are likely based on document type		

8. Operational Preparation Checklist

Item	Yes / No / N/A	Notes
Documents reviewed before departure		
Witness requirements confirmed		
Notarial areas identified		
Shipping supplies prepared		
Scanback expectations reviewed		
Healthcare-environment adaptation supplies prepared		
Access instructions saved		
Attorney / hiring-party contact saved		
Role-boundary language prepared		

9. Intake Script Prompts

Purpose	Suggested Question
Confirm access	Is there anything I should know about parking, visitor check-in, gate access, or room location before arrival?
Confirm witness logistics	Are witnesses required, and if so, who is responsible for arranging them?
Confirm environment needs	Will the signer need any accommodation for seating, writing surface, lighting, hearing, vision, or pacing?

Confirm role boundaries	If the signer has legal questions during the appointment, who should I contact for attorney guidance?
Confirm completion steps	Are scanbacks, shipping, courier pickup, or special return instructions required?

10. Post-Ceremony Tracking

Field	Intake Notes
Appointment completed?	
Completion time	
Scanbacks completed?	
Shipment tracking number	
Courier / delivery / pickup status	
Completion notes	
Issues escalated	
Follow-up needed	

Author tip: Strong intake procedures often prevent avoidable environmental stress later in the ceremony. Preparation, organization, and thoughtful operational awareness help create calmer signing experiences.

These aren't transactions. These are legacies.