Estate Planning Intake Questionnaire

Congratulations on taking the first steps to protecting your family and your assets. A personalized estate plan, which for most of us is a Simple Will or Trust, is the best way to ensure that your property will be handled in the manner that you want and that best provides for your family. To help us better understand your needs, please complete this simple questionnaire to guide us through our initial conversation.

Basic Information	
Your Full Legal Name:	
Best Telephone Number:	Mailing Address:
Email Address:	Preferred Method of Contact: Select
Are you a resident of New York State? Select	Have you previously made a Will, Trust or Estate Plan? Select
What is the Estimated value of your total estate? Select	

Tell Us About Your Family & Intent
Are you currently married? Select
Do you have biological children? Select
Do you have Step-Children or a Domestic Partner you wish to provide for? Select
Do you have other Family Members, Friends or Organizations you'd like to provide for? Select

Briefly Check Which Categories of Assets You Have to Consider in Your Estate Plan			
Real Property	Select	Insurance Policy(ies)	Select
Pension/IRA	Select	Safe Deposit Box	Select
Personal Effects (jewelry, etc.)	Select	Vehicles	Select

Are There Other Related Services You May Want?			
Living Will:	Select	Health Care Proxy:	Select
Power of Attorney:	Select	Other:	Select

Is There Any Other Information You Would Like to Provide at This Time?

** Please note that providing this information shall only serve as a guide in the initial consultation wherein additional information may be required to fully assess your needs. You may be asked to provide further documents to complete the initial assessment including insurance policies, deeds and titles to property, etc. Although the appropriate confidentiality rules apply, a binding attorney-client relationship is not effectuated until the time of formal retainer.**