

## PLANNING INFORMATION

**PRIVACY:** Your privacy and confidentiality will be honored.

### **BASIC INFORMATION NEEDED FOR PLANNING:**

Name(s) as appearing on formal documents and accounts:

Marital Status:

What planning would you like to do? For example, will, trust, power of attorney, etc.

Are looking for a same-day simple will and other planning documents? If so, be sure to specify.

Do you have, or expect to have, Medical Assistance or nursing home expense?

Do you wish to emphasize tax avoidance?

Do you wish that some or all of your property go to someone other than your spouse?

How soon do you need this completed?

Are there any barriers to completing this quickly? Such as physical impairment, uncertainty about what you want to do, lack of cooperation or agreement among heirs, etc.

Do you have a will or trust or other documents currently in force?

Do you want to be contacted to begin this process?

How would you like to be contacted? By phone or e-mail? Can this be accomplished confidentially?

**Remember: Nothing is in force until fully completed and signed as the law requires. If you want to proceed, it is important to prioritize this matter and follow through.**

**No attorney-client relationship is formed until a written retainer agreement has been signed and any payment received.**