



FrancesDyal
FAMILY LAW

CLIENT INTAKE FORM
LAST WILL & TESTAMENT INFORMATION

Name: _____

Address: _____

Home Phone: _____ Work/Cell/Other: _____

Email: _____

Spouse: _____

Children: _____

Executor: _____

Successor Executor: _____

The Executor has the duty to marshal up the assets of your estate, pay the debts of the estate, and make sure distributions are made pursuant to your wishes as expressed in your Will.

Gaurdian(s) for children: _____

Successor Guardian: _____

Trustee(s) for children: _____

Successor Trustee(s): _____

If you would like the assets of your estate that may pass to your minor children to be held in trust until they reach an age of majority, please state who you would like to serve as Trustee of that Trust.

Age at 1st distribution: _____ Age at 2nd distribution, if any: _____

Burial instructions: _____

Beneficiaries: *(other than spouse or children)*:

Name: _____ Name: _____

Name: _____ Name: _____

Specific bequests: _____

Specific bequests usually comprise of real and personal property that you want a specific individual to have.

FOR OFFICE USE

Quoted Fee: _____ Retainer: _____