**CONFIDENTIAL**
**ESTATE PLANNING**
**INTAKE INFORMATION**

**Probate Information & Asset Summary**

CHAMBERS & ENNIS

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**PERSONAL INFORMATION**

Referred by: ________________ ____________Date

Full Legal Name ______________________________ Preferred Name:____________

Name Used to Sign Legal Documents_______________________________________

Home Address ______________________________________________________

City ____________________ State _____ Zip Code ________County ______________

Contact: (H)_______________ (C) _________________ (W) __________________

email address: ________________________________________________________

Soc. Sec. No. _______________

Date of Birth _______________

Deceased Person's Name ______________________________________________

Relation _________________________

Date of Marriage ___________

Date of Death ____________

Soc. Sec. No. _______________

Date of Birth _______________

Have you or the decedent previously completed will, trust, or estate planning? YES* NO

If YES, what kind of planning and when? _______________________________

**It would be helpful for you to bring existing wills and/or trusts to your consultation for review*

## DOCUMENTS TO BRING WITH YOU TO YOUR APPOINTMENT

1) Original Will

2) Death Certificates

3) <u>Asset Listing</u>
   Please include ownership, Account numbers, Date of Death Value and indicate if there were beneficiary designations, such as POD/TOD and/or beneficiary designation forms.
   a. Checking
   b. Savings
   c. CDs
   d. Personal Residence
   e. Motor Vehicles
   f. Life Insurance
   g. 401(k), IRA
   h. Investment Accounts
   i. Stock Certificates
   j. Annuities
   k. Other Real Estate
   l. Other Assets

4) Paid in Full Funeral Receipt

5) Signature Card on bank accounts that are titled as Joint Tenants with Rights of Survivorship.