

Estate Planning

CLIENT INTAKE & MEETING PREPARATION

01 Personal information

Complete after our office requests intake and confirms the conflict-screening step. Unknown / N/A is OK.
Do not enter full SSNs, account numbers, passwords or payment-card details. Keep completed copies private.
Download and save locally before typing. No information is sent to our office by filling in this PDF.

Your full legal name

Spouse/partner full legal name, if applicable

Your residence: street, city, county, state, ZIP

Phone / email / safe contact method and time

State(s) involved: New Jersey / New York / other; property in other states

Person completing this form; relationship; others assisting

Marital status; prior marriages; relevant agreements

Your goals and questions for the meeting

Ask our office for a verified secure return method, or bring a printed copy to your meeting.
Do not return sensitive completed forms through the website contact form or ordinary email.
Not a court/agency application or legal advice. Completing this form does not establish representation.

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02 Family and decision-makers

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Children / beneficiaries: names, relationships, adult or minor; add a private sheet if needed

Family circumstances to discuss: blended family, disability/benefits, conflict or care concerns

People you are considering as executor, trustee, financial agent or health care agent

Existing will / trust / power of attorney / health directive: dates and who holds copies

Health or long-term-care concerns you wish to discuss; veterans benefits or insurance

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03 Financial overview and preparation

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Real estate: location, approximate value, mortgage, owner(s); do not include account numbers

Bank / investment / retirement accounts: type, approximate balance and owner(s)

Insurance / annuities / business interests / other property: type, value and ownership

Income / debts / existing beneficiary designations: brief summary

Prior gifts, transfers or trusts: date, approximate value and recipient; questions about funding

Documents available and additional questions; keep originals safe

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