

CLIENT INTAKE SHEET

Full Name w/ initials: _____

Spouse: _____

Children: Yes _____ No _____

Physical Address: _____

Mailing Address (if different): _____

Seasonal Address: _____

State/Country of Residency: _____

Do you own real estate outside of your state of residency? If so, what states: _____

Phones: (H) _____

(C1) _____ (C2) _____

Email(s): _____

Reason for Contact: _____

Referred by: _____

Existing docs? (Wills, Durable Powers of Attorney, Trusts, etc.) _____

Approx. value of estate: _____ (this would include annuities, life insurance, real estate investment accounts, stocks, bonds etc.)

ADDITIONAL NOTES: _____
