**CLIENT INFORMATION WORKSHEET**

**PART 1: PERSONAL DATA**

Name: DOB:

Street Address: SS#:

City: State: Zip: Home #:

Employer: Work #:

E-mail: Cell #:

Alias Names (if any):

Are you a U.S. citizen? Yes: No:

CHILDREN'S INFORMATION:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Living? | Age | Birthdate | Married? | City/State of Residence |
|  | Yes/No |  |  | Yes/No |  |
|  | Yes/No |  |  | Yes/No |  |
|  | Yes/No |  |  | Yes/No |  |
|  | Yes/No |  |  | Yes/No |  |
|  | Yes/No |  |  | Yes/No |  |
|  | Yes/No |  |  | Yes/No |  |

For each child, state the name of the child's other parent if not your present spouse.

OTHER DEPENDENTS, IF ANY:

|  |  |  |
| --- | --- | --- |
| Name: | Age: | Residence: |
|  |  |  |
|  |  |  |

GRANDCHILDREN'S INFORMATION

|  |  |  |  |
| --- | --- | --- | --- |
| Name: | Age: | Birthdate: | Names of parents: |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Please provide the following information regarding any former marriages:

Name of former spouse Living? Date of Death or Divorce

YES/NO

YES/NO

YES/NO

Do you presently have a Will? Yes: No: If so, what is the date on the Will?

Was it signed in Texas? Yes: No: If not, where?

Amended Will or Codicil? Yes: No: Date:

Spouse presently has a Will? Yes: No: If so, what is the date on the Will?

Was it signed in Texas? Yes: No: If not, where?

Amended Will or Codicil? Yes: No: Date:

**PART II-a**

**YOUR DISPOSITIVE PLAN**

Describe in general terms how you wish to distribute your property under your will:

If your children are beneficiaries of your property, do you want the property to be distributed to your children outright or in trust until a certain date?

Outright

In Trust until reach age , then outright

In Trust with distributions at various ages and amounts

percent at age

percent at age

percent at age

remaining share at age

If your grandchildren are beneficiaries of your property, do you want the property to be distributed to your grandchildren outright or in trust until a certain date?

Outright

In Trust until reach age , then outright

In Trust with distributions at various ages and amounts

percent at age

percent at age

percent at age

remaining share at age

**PART III-a - YOUR DESIGNEES**

**EXECUTOR** (i.e., the person who will be responsible for probating your will, filing the estate tax return, if necessary, and distributing assets to the beneficiaries)

Name of Executor:

1st Alternate Executor:

2nd Alternate Executor:

3rd Alternate Executor:

**TRUSTEE** (i.e., the person who will be responsible for the long-term management of property for the surviving spouse, children or other beneficiaries)

Name of Trustee:

1st Alternate Trustee:

2nd Alternate Trustee:

3rd Alternate Trustee:

**GUARDIAN OF MINOR CHILDREN** (i.e. the person who will take physical care of your minor children should both parents die)

Name of Guardian:

1st Alternate Guardian:

2nd Alternate Guardian:

3rd Alternate Guardian: