

PLEASE SEE INSTRUCTIONS ON BACK

### CLIENT INFORMATION

DATE: \_\_\_\_\_

FULL NAME: \_\_\_\_\_ ( " \_\_\_\_\_ " ) NICKNAME AGE: \_\_\_\_\_ U.S. CITIZEN \_\_\_\_\_

\*Social Security Number: \_\_\_\_\_

e-mail: \_\_\_\_\_

SPOUSE: \_\_\_\_\_ ( " \_\_\_\_\_ " ) AGE: \_\_\_\_\_ U.S. CITIZEN \_\_\_\_\_

\*Social Security Number: \_\_\_\_\_

e-mail: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

COUNTY: \_\_\_\_\_

PHONE: HOME: \_\_\_\_\_

WK(His): \_\_\_\_\_ COMPANY: \_\_\_\_\_ YEARS \_\_\_\_\_  
Or retired from

WK(Hers): \_\_\_\_\_ COMPANY: \_\_\_\_\_ YEARS \_\_\_\_\_  
Or retired from

MARITAL: YEARS MARRIED \_\_\_\_\_ PREVIOUS MARRIAGE? Him \_\_\_\_\_ Children \_\_\_\_\_

Her \_\_\_\_\_ Children \_\_\_\_\_

CHILDREN: (OR SPECIFY HEIRS AT LAW IF NO SPOUSE OR DESCENDANTS)

MENT/PHYS DISABILITY	Male/ Female	FULL NAME	NICKNAME	AGE	MARITAL STATUS	# OF CHILDREN
_____	_____	_____	( " _____ " )	_____	_____	_____
_____	_____	_____	( " _____ " )	_____	_____	_____
_____	_____	_____	( " _____ " )	_____	_____	_____
_____	_____	_____	( " _____ " )	_____	_____	_____
_____	_____	_____	( " _____ " )	_____	_____	_____
_____	_____	_____	( " _____ " )	_____	_____	_____
_____	_____	_____	( " _____ " )	_____	_____	_____

Do you have any deceased children? \_\_\_\_\_ Name(s) \_\_\_\_\_ Age \_\_\_\_\_ # of Children \_\_\_\_\_

HIS PARENTS LIVING: \_\_\_\_\_ INHERITANCE?: \_\_\_\_\_ LIKELY TO SUPPORT PARENTS? \_\_\_\_\_

HER PARENTS LIVING: \_\_\_\_\_ INHERITANCE?: \_\_\_\_\_ LIKELY TO SUPPORT PARENTS? \_\_\_\_\_

NOTES: \_\_\_\_\_

REFERRED BY/ SEMINAR ATTENDED: \_\_\_\_\_

PARALEGAL RESPONSIBLE FOR YOUR FILE: \_\_\_\_\_

The New Client Information Form asks for your basic family information such as your name, address, names of your children, number of grandchildren, etc. At the bottom of this form there is a section that asks if you expect any inheritance from your parents. I ask this question because any inheritance you may receive will eventually be part of your estate. If you do not know this information please indicate with a question mark.