

Estate Planning Client Intake

Date: _____

Full Name: _____

Home Address: _____ Phone: _____

Business Address: _____ Phone: _____

Place of Birth: _____

Date of Birth: _____

Social Security Number: _____

Married: _____ Yes _____ No

If married, complete the following for spouse:

Full Name: _____

Business Address: _____ Phone: _____

Place of Birth: _____

Date of Birth: _____

Social Security Number: _____

If there are children, complete the following for each child:

Name	Date of Birth	Residence, if not living at home
_____	_____	_____
_____	_____	_____
_____	_____	_____

Do you or your spouse have any children by a previous marriage [or any illegitimate children]?

_____ Yes _____ No

Do you, your spouse or child have any physical, mental, or emotional disability?

_____ Yes _____ No

Lateesha Hunter
LATEESHA D. HUNTER, P.C.
P.O. BOX 12742
Oklahoma City, OK 73157

DESCRIPTION OF PROPERTY:**Income**

	Husband	Wife	Joint
Salary, Commission & Bonus	\$ _____	\$ _____	\$ _____
Dividends and Interest	\$ _____	\$ _____	\$ _____
Net Real Estate Income	\$ _____	\$ _____	\$ _____
Other Income	\$ _____	\$ _____	\$ _____

Assets**Liquid Assets**

Savings Accounts	\$ _____	\$ _____	\$ _____
Checking Accounts	\$ _____	\$ _____	\$ _____
Certificates of Deposit/Money Market Accounts	\$ _____	\$ _____	\$ _____
U.S. Gov't Securities	\$ _____	\$ _____	\$ _____
Municipal Bonds	\$ _____	\$ _____	\$ _____
Marketable Stocks	\$ _____	\$ _____	\$ _____
Marketable Corporate Bonds	\$ _____	\$ _____	\$ _____
Mutual Funds	\$ _____	\$ _____	\$ _____
Mortgages	\$ _____	\$ _____	\$ _____
Notes	\$ _____	\$ _____	\$ _____

Other Assets

Residence	\$ _____	\$ _____	\$ _____
-----------	----------	----------	----------

Lateesha Hunter
LATEESHA D. HUNTER, P.C.
P.O. BOX 12742
Oklahoma City, OK 73157

Vacation Home	\$ _____	\$ _____	\$ _____
Investment Real Estate	\$ _____	\$ _____	\$ _____
Automobiles	\$ _____	\$ _____	\$ _____
Other Tangible Personal Property	\$ _____	\$ _____	\$ _____

Liabilities

Current Accounts	\$ _____	\$ _____	\$ _____
Unsecured Notes Payable to Banks	\$ _____	\$ _____	\$ _____
Notes Payable to Others	\$ _____	\$ _____	\$ _____
Unpaid Taxes	\$ _____	\$ _____	\$ _____
Mortgage on Residence	\$ _____	\$ _____	\$ _____
Other Mortgages	\$ _____	\$ _____	\$ _____

List any contingent liabilities below:

Prior to [today's date], have you made any gifts of cash or property. If so, please state such gifts and provide details and copies of any gift tax returns that were filed.

Lateesha Hunter
LATEESHA D. HUNTER, P.C.
P.O. BOX 12742
Oklahoma City, OK 73157

Have you ever executed a prenuptial agreement or a separation agreement? _____ Yes
 _____ No

Where is the location of all property that you have an interest in?

Do you own Indian land or expect to acquire an interest in Indian land? If so, please details regarding the property's location.

Do you have a will and/or a power of attorney? Please furnish copies of your present will (and any codicils) and any power of attorney you may have executed.

If you are a present or future beneficiary under any will or trust agreement, please provide copies of any such instruments.

Do you wish for your executor to post a bond? _____ Yes _____ No

What fee do you wish to give your executor as compensation for his/her service?

Please list those persons upon whom you depend for business or financial advice in the following categories:

	Name	Address	Telephone No.
Accountant			

Lateesha Hunter
 LATEESHA D. HUNTER, P.C.
 P.O. BOX 12742
 Oklahoma City, OK 73157

- Trust Officer
- Insurance
- Financial Advisor
- Other (state capacity)

If you have ever established a trust, please provide a copy of the trust instrument.

Please list the location and contents of any safe deposit box to which you have access. If any contents do not belong to you, please identify such items.

Identify the person you would like to perform the following functions:

Personal Representative

Primary Personal Representative _____
First Alternate _____
Second Alternate _____

Guardian for Minor Children

Primary Guardian _____
First Alternate _____
Second Alternate _____

Trustee for Children

Primary Trustee _____
First Alternate _____
Second Alternate _____

Durable Power of Attorney

Primary Agent _____
First Alternate _____
Second Alternate _____

Describe generally how your estate should be distributed in each of the following circumstances:

Lateesha Hunter
LATEESHA D. HUNTER, P.C.
P.O. BOX 12742
Oklahoma City, OK 73157

1. If your spouse and your children survives you.

2. If your spouse does not survive you, but your children or grandchildren do survive you. Also consider if one or more of your children predeceases you.

3. If neither your spouse nor any of your children or grandchildren survives you.

4. If you and your spouse die simultaneously.

5. If you wish any special disposition of specific items of your property, please describe below the items and the persons to whom distribution is to be made.

Lateesha Hunter
LATEESHA D. HUNTER, P.C.
P.O. BOX 12742
Oklahoma City, OK 73157

6. Do you wish your liabilities to be paid out of your estate or by the person who acquires the asset(s) on which there is an outstanding balance?
