



What works best for me a Will or a Trust and what it cost?

By answering the following questions we will be able to provide you with a cost estimate and description of an initial plan.

Name: _____ Telephone: _____

Name: _____

Email: _____

State and County of Residence: _____

Marital Status: Married, Single, Divorced, Unmarried Couple, Remarried.

Children:

All from same couple. Number of adult children __, number of minor children __.

Blended, His: Number of adult children __, number of minor children ____.

Hers: Number of Adult Children __, number of minor children ____.

Ours: Number of Adult Children __, number of minor children ____.

Any children with special needs or substance abuse problems? If yes please briefly describe:

Property ownership, check all that apply:

Real Estate: Family home only, Home and other real estate or oil interests, None.

Retirement: IRAs, 401k, governmental retirement, other retirement plan.

Investments: Mutual Funds, Stocks, Bonds, Money Market, Other.

Businesses: Closely held businesses, Farm or Ranch

Type: Sole proprietor, Partnership, Incorporated, LLC, Other

Special Assets: RVs, Aircraft, High Value Assets?

What is the best way to contact you? Email, Telephone, best time if by telephone _____.

Please include me in any newsletters: Yes, No.

If single, do you expect all of your assets to be worth more than \$5.34 Million? Yes, No.

If a married couple, do your expect your assets to be worth more than \$10.68 Million? Yes, No.

Please send by fax, email or mail.