YATES LAW GROUP
ATTORNEY AT LAW

ESTATE PLANNING INTAKE

This form gives us what we need to prepare your Will, Trust, Powers of Attorney, and related Texas estate planning documents. Please complete what you can. If you are unsure about an answer, leave it blank and we will go over it together at our consultation.

If you are single, complete only the "Client 1" column. Please do not write Social Security or account numbers on this form.

SECTION 1: ABOUT YOU

	Client 1	Client 2 (Spouse)
Full legal name		
Sex	☐ Male ☐ Female	☐ Male ☐ Female
Cell phone		
Email		
U.S. citizen?	☐ Yes ☐ No If no, status: _____	☐ Yes ☐ No If no, status: _____
Home address (street, city, county, ZIP)		
Marital status	☐ Married ☐ Single ☐ Widowed ☐ Divorced	
Approximate net worth	**$** _____ *Include all assets and the death benefit of any life insurance policies.*	

SECTION 2: CHILDREN

Please list every child, living or deceased, whether biological or adopted, and any child you have raised as your own. Married couples should also list each spouse's children from other relationships. We need to know about every child even if you do not plan to leave that child anything.

Children together: ____	**Children of Client 1 only: ____**	**Children of Client 2 only: ____**

#	Child's full name	Age	Child of (check one)	Deceased?	Special needs?*
1			☐ Both ☐ C1 ☐ C2	☐ Yes	☐ Yes
2			☐ Both ☐ C1 ☐ C2	☐ Yes	☐ Yes
3			☐ Both ☐ C1 ☐ C2	☐ Yes	☐ Yes
4			☐ Both ☐ C1 ☐ C2	☐ Yes	☐ Yes
5			☐ Both ☐ C1 ☐ C2	☐ Yes	☐ Yes
6			☐ Both ☐ C1 ☐ C2	☐ Yes	☐ Yes

Both = child of both spouses; C1 = Client 1 only; C2 = Client 2 only.

***Special needs:** Check "Yes" if a child has a disability and receives, or may need, government benefits such as SSI or Medicaid. A supplemental needs trust can protect those benefits.

SECTION 3: HOW YOU WANT YOUR ESTATE DISTRIBUTED

Check the option that best fits your wishes. These are only examples; you may divide your estate any way you choose.

A. Married — all children are children of both spouses

- ☐ All to my spouse; if my spouse does not survive me, equally to our children
- ☐ One-half to my spouse and one-half to our children
- ☐ All to my spouse and nothing to our children
- ☐ Other: _____

B. Married — one or both of us have children from another relationship

- ☐ All to my spouse; if my spouse does not survive me, equally among my children and my spouse's children
- ☐ All to my spouse; if my spouse does not survive me, only to my own children
- ☐ One-half to my spouse and one-half to my children and my spouse's children
- ☐ Other: _____

C. Married — no children

- ☐ All to my spouse; if my spouse does not survive me, to: _____
- ☐ One-half to my spouse and one-half to: _____
- ☐ Other: _____

D. Not married, with children

- ☐ All to my children in equal shares
- ☐ One-half to my children and one-half to: _____
- ☐ Other: _____

At what age should a child or other young beneficiary receive his or her share outright?

Until then, the share stays in trust and may be used for the beneficiary's health, education, and support.

- ☐ At age ____
- ☐ In stages: ___% at age ___, ___% at age ___, ___% at age ___, remainder at age ___
  Example: 25% at age 21, 25% at age 25, 25% at age 30, and 25% at age 35
- ☐ Keep in trust for the beneficiary's lifetime — allow the beneficiary to serve as his or her own trustee at age ____
- ☐ I would like to discuss this at our consultation

Specific gifts (for example: "My truck to my oldest son, John")

Texas is a community property state. Each spouse may leave his or her one-half of the community property plus all of his or her separate property. We will review how your assets are titled at our consultation.

Other distribution plan

SECTION 4: TRUSTEES

You will serve as the initial trustee of your living trust (if married, you and your spouse will serve as co-trustees), so you keep full control of your property during your lifetime. Who should take over as trustee after you (and your spouse) can no longer serve? List two choices in order. To have two people serve together as co-trustees, list both names on one line.

1st choice	
2nd choice	

Trustees should live in the United States or be U.S. citizens living abroad; a non-U.S. trustee can cause adverse tax consequences.

SECTION 5: EXECUTORS

Your executor carries out the terms of your Will. In most plans your spouse serves first, followed by the same people you named as successor trustees. Texas law allows your executor to serve as an independent executor without bond, which reduces court involvement and cost.

☐ My spouse (if married), then the same people I named as successor trustees in Section 4
☐ Different people, in this order:

1st Choice / 1st Alternate	
2nd Choice / 2nd Alternate	

SECTION 6: GUARDIAN FOR YOUR CHILDREN

If you have minor children, or an adult child who is incapacitated, who should serve as the child's guardian? This normally takes effect only if the child's other parent has died or cannot serve. Co-guardians must be married to each other.

1st choice	
2nd choice	

SECTION 7: YOUR OWN GUARDIAN (IF EVER NEEDED)

Texas law lets you name, in advance, who you want a court to appoint as your guardian if you ever become incapacitated and a guardianship becomes necessary. You may also name anyone you do not want to serve.

	Client 1	**Client 2 (Spouse)**
1st choice	☐ My spouse or: _____	☐ My spouse or: _____
2nd choice		
Anyone you do NOT want to serve (optional)		

SECTION 8: POWERS OF ATTORNEY

A **Medical Power of Attorney** lets someone make health care decisions for you if you cannot. A **Statutory Durable Power of Attorney** lets someone handle your finances, such as paying bills and managing accounts. Both end at death. **Spouses may choose different agents — simply complete your own column.**

	Client 1	Client 2 (Spouse)
MEDICAL POWER OF ATTORNEY		
Primary agent	☐ My spouse or: _____	☐ My spouse or: _____
1st alternate		
2nd alternate		
FINANCIAL (STATUTORY DURABLE) POWER OF ATTORNEY		
Primary agent	☐ My spouse or: _____	☐ My spouse or: _____
1st alternate		
2nd alternate		

SECTION 9: BUSINESS INTERESTS

Do either of you own an interest in a formally organized business, such as an LLC, corporation, or limited partnership?
☐ **Yes** ☐ **No**

If yes, please complete the table below.

Company name	State filed	Type of entity	Member(s) / owner(s) and % owned
		☐ LLC ☐ Corporation ☐ Other: _____	_____ ___% _____ ___%
		☐ LLC ☐ Corporation ☐ Other: _____	_____ ___% _____ ___%
		☐ LLC ☐ Corporation ☐ Other: _____	_____ ___% _____ ___%

SECTION 10: OTHER REAL ESTATE

Aside from your homestead, do you own any other real estate (rental property, vacation home, land, or property in another state)? ☐ **Yes** ☐ **No**

If yes, list each property address. Property outside Texas may require a separate probate in that state unless it is held in your trust.

#	Property address (street, city, state)
1	
2	
3	

SECTION 11: SPECIAL PROVISIONS OR CONCERNS

Is there anything else we should know? Examples: care of pets, charitable gifts, a beneficiary you wish to leave out or treat differently, or concerns about a beneficiary's spending, debts, or marriage.

SECTION 12: STATEMENT TO FAMILY OR STATEMENT OF FAITH (OPTIONAL)

A personal or faith statement is traditionally placed at the beginning of your Will so you can speak to your loved ones after you pass. Keep in mind that a Will becomes a public record once it is probated. It does not need to be long or elaborate. If you would like to include one, write it below or we can discuss it at our consultation.

> **Sample 1:** *Upon my passing, know that I loved my family greatly, and I am now at peace. Live your life to the fullest, never taking the next day for granted, and never forgetting that the most important things are those closest to you.*
>
> **Sample 2:** *I praise God for the life given to me, my family, my spouse, and my children. The Lord blessed me with so much that my cup continually overflowed with love and joy. I want all who read this to know that Jesus Christ is my Savior. May God grant you peace, love, and strength as He guides you through this life, until we are reunited in heaven as a happy family.*

Please return this form to our office before your consultation. Thank you!