

GREAT OAKS LAWYERS

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Estate Planning Consultation Request

Thank you for your interest in our estate planning services! To make your free consultation as valuable as possible, please answer these brief questions. This should take about 2-3 minutes.

1. Your Contact Information

Your Name: _____

Phone Number: _____ Email: _____

Spouse/Partner Name (if applicable): _____

2. Marital/Family Status

Married Single Divorced Widowed Domestic Partnership

3. Children

Do you have children? Yes No

If yes, how many children? _____ Any children under 18? _____

Children from previous relationship? Yes No

4. Real Property

Do you own real estate (home, rental property, land)? Yes No

If yes, approximate value: _____ Location: _____

Own property in another state? Yes No

5. Approximate Total Estate Value

(Include home, bank accounts, retirement accounts, life insurance, investments - rough estimate is fine)

Under \$500,000

\$500,000 - \$1,000,000

\$1,000,000 - \$2,000,000

Over \$2,000,000

Not sure

6. What Brings You In?

(Check all that apply)

We need to create a living trust

Update or amend existing trust

Healthcare directive / Power of attorney

Not sure what we need - want to discuss options

Specific concern or question: _____

7. How Did You Hear About Us?

Referral from: _____ Google search Yelp Facebook Other: _____

That's it! We look forward to meeting with you.

Please return this form by email to office@greatoakslawyers.com or bring it to your consultation.

All information is confidential and protected by attorney-client privilege.