

**CONFIDENTIAL
ESTATE PLANNING
INTAKE INFORMATION**

Probate Information & Asset Summary

CHAMBERS, ENNIS
& BLUMHARDT

PERSONAL INFORMATION

Referred by: _____ Date _____

Full Legal Name _____ Preferred Name: _____

Name Used to Sign Legal Documents _____

Home Address _____

City _____ State _____ Zip Code _____ County _____

Contact: (H) _____ (C) _____ (W) _____

email address: _____

Soc. Sec. No. _____

Date of Birth _____

Deceased Person's Name _____

Relation _____

Date of Marriage _____

Date of Death _____

Soc. Sec. No. _____

Date of Birth _____

Have you or the decedent previously completed will, trust, or estate planning? YES* NO

If YES, what kind of planning and when? _____

**It would be helpful for you to bring existing wills and/or trusts to your consultation for review*

DOCUMENTS TO BRING WITH YOU TO YOUR APPOINTMENT

1) Original Will

2) Death Certificates

3) Asset Listing

Please include ownership, Account numbers, Date of Death Value and indicate if there were beneficiary designations, such as POD/TOD and/or beneficiary designation forms.

- a. Checking
- b. Savings
- c. CDs
- d. Personal Residence
- e. Motor Vehicles
- f. Life Insurance
- g. 401(k), IRA
- h. Investment Accounts
- i. Stock Certificates
- j. Annuities
- k. Other Real Estate
- l. Other Assets

4) Paid in Full Funeral Receipt

5) Signature Card on bank accounts that are titled as Joint Tenants with Rights of Survivorship.