

# GOLDSMITH & GUYMON

*A Professional Corporation*

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## NEW CLIENT QUESTIONNAIRE FOR ESTATE PLAN - Unmarried/Single Person

The following information will assist the attorney in the initial interview and will save time (and, therefore, fees). Please print legibly. If you do not have sufficient room to complete an answer, please write on the back of the page (and so indicate). Answer to the best of your ability. Feel free to skip a question if you are unsure. At the time of the consultation, the attorney will help you to determine what your estate planning needs are.

### GENERAL INFORMATION:

YOUR NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

### CONTACT INFORMATION FOR YOU:

HOME: \_\_\_\_\_ BUSINESS: \_\_\_\_\_

CELLULAR: \_\_\_\_\_ FAX: \_\_\_\_\_

E MAIL ADDRESS: \_\_\_\_\_

YOUR SOCIAL SECURITY NO. \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

WHO REFERRED YOU TO GOLDSMITH & GUYMON? \_\_\_\_\_

TO WHOM WERE YOU REFERRED? \_\_\_\_\_

ARE YOU A U.S. CITIZEN? Yes /No, If no, Citizen of \_\_\_\_\_

**ESTATE PLANNING INFORMATION:**

What is the primary purpose of the consultation today? \_\_\_\_\_

\_\_\_\_\_

1. Do you know what you want to call your Trust? If so what name: \_\_\_\_\_

2. Do you want to remain in charge of your assets for so long as you are able to do so?  
Yes / No

3. If you cannot serve as Trustee, who do you want to be Trustee and be in charge of the Trust: \_\_\_\_\_

4. Why have you chosen the person or company named in #3: \_\_\_\_\_

5. In general terms what types of assets do you own? Please circle all that apply:

Home, stock, bonds, other securities, interest in business, bank accounts, pensions, other real estate in Nevada, real estate in states other than Nevada, vehicles, other

6. Does the value of these assets exceed Two Million Dollars? Yes / No

7. Number of Children: \_\_\_\_\_

8. Children (give full names, birth dates and present residence location):

COMPLETE NAME(S)	BIRTH DATES	PLACE OF RESIDENCE

9. If the children are minors, who is/are the other parent[s]? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
10. If the children are minors, and something happens to both parents such that the parents cannot raise the children, who is your first choice to raise the children? (Name and Address): \_\_\_\_\_  
\_\_\_\_\_
11. Who is the second choice (Name and Address): \_\_\_\_\_  
\_\_\_\_\_
12. If you cannot make your financial decisions, who do you want to make those financial decisions for you (Name and Address): \_\_\_\_\_  
\_\_\_\_\_
13. Who is the second choice (Name and Address): \_\_\_\_\_  
\_\_\_\_\_
14. If you cannot make your health care decisions, who do you want to make health care decisions for you (Name, Address and Phone Number): \_\_\_\_\_  
\_\_\_\_\_
15. Who is the second choice (Name, Address, Phone Number) : \_\_\_\_\_  
\_\_\_\_\_
16. Name and location of Attending Physician, (i.e. Dr. John Smith, presently practicing in Las Vegas, Nevada)  
\_\_\_\_\_  
\_\_\_\_\_

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