

# GOLDSMITH & GUYMON

*A Professional Law Corporation*

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## NEW CLIENT INFORMATION FORM

(Trust/Estate Litigation)

The following information will assist the attorney in the initial interview and will save time (and, therefore, fees). Please print legibly. (Feel free to attach your business card in lieu of name, address, etc.) 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. You can discuss any problems or questions when you meet with the attorney.

There is generally a fee for the initial consultation, and you may leave a check with the receptionist or the attorney's secretary. If further services are agreed upon, you will be asked to sign a fee agreement and to pay a retainer.

The purpose of this initial consultation is to give you the opportunity to describe your legal problem. The attorney will then set forth your options under the law and estimate the time and expense involved. Seldom is there an easy answer to a complex legal problem, but we will do our best to answer your questions and address your concerns.

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### GENERAL INFORMATION:

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

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

PHONE(S): HOME: \_\_\_\_\_ BUSINESS: \_\_\_\_\_

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

SOCIAL SECURITY NO. \_\_\_\_\_ OCCUPATION: \_\_\_\_\_

LIST THE NAME(S) OF ANYONE ACCOMPANYING YOU TODAY:

\_\_\_\_\_  
\_\_\_\_\_

WHO REFERRED YOU TO OUR FIRM? \_\_\_\_\_

TO WHICH ATTORNEY WERE YOU REFERRED? \_\_\_\_\_

BRIEFLY DESCRIBE THE NATURE OF YOUR LEGAL PROBLEM OR WHY YOU ARE SEEKING OUR ADVICE:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

TRUST/ ESTATE INFORMATION:

IF YOU ARE HERE AS A BENEFICIARY OF AN ESTATE OR TRUST, PLEASE COMPLETE THE FOLLOWING:

NAME OF TRUST: \_\_\_\_\_

TRUSTOR[S] (*Person or persons who made the Trust*): \_\_\_\_\_

CURRENT TRUSTEE (*person Managing Trust*): \_\_\_\_\_

ADDRESS OF CURRENT TRUSTEE: \_\_\_\_\_

DO YOU HAVE A COPY OF THE TRUST? YES \_\_\_\_ NO \_\_\_\_

IF SO PLEASE PROVIDE A COPY TO OUR OFFICE AT YOUR EARLIEST CONVENIENCE, PREFERABLY BEFORE YOUR CONSULTATION.

IS THERE A CURRENT COURT CASE? YES \_\_\_\_ NO \_\_\_\_

IF SO, WHAT IS THE CASE NUMBER? \_\_\_\_\_

WHERE IS IT PENDING? \_\_\_\_\_

DO YOU HAVE PLEADINGS? YES \_\_\_\_ NO \_\_\_\_

WHAT STEPS HAVE YOU TAKEN TO WORK WITH THE CURRENT TRUSTEE?

\_\_\_\_\_  
\_\_\_\_\_

LIST THE NAMES OF ALL BENEFICIARIES AND/OR RELATIVES (Spouse of Trustor, Children of Trustor, Grandchildren of Trustor, Brothers/Sisters of trustor, Grandchildren of Trustor, Parents of Trustor, Grandparents of Trustor) THAT ARE INVOLVED:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_

**CONFLICTS:** THE FOLLOWING INFORMATION IS NECESSARY SO THAT WE CAN AVOID ANY CONFLICT OF INTEREST:

LIST THE NAMES OF INDIVIDUALS, WITH WHOM YOU HAVE A DISPUTE CONCERNING THE ABOVE LEGAL PROBLEM:

NAME:	COMMENTS:
_____	_____
_____	_____
_____	_____

SPOUSE'S NAME: \_\_\_\_\_

NAMES OF CHILDREN:

\_\_\_\_\_  
\_\_\_\_\_

LIST THE NAMES OF ALL BUSINESSES IN WHICH YOU HAVE AN OWNERSHIP INTEREST, NOT PREVIOUSLY LISTED:

\_\_\_\_\_  
\_\_\_\_\_

DOCUMENTS:

MAKE SURE TO PROVIDE THE ATTORNEY WITH ALL RELEVANT DOCUMENTS.

HAVE YOU BROUGHT WITH YOU ALL DOCUMENTS RELATING TO YOUR LEGAL PROBLEM?

YES \_\_\_\_\_ NO \_\_\_\_\_

IF YOU HAVE NOT BROUGHT ALL RELEVANT DOCUMENTS, WHAT OTHER DOCUMENTS EXIST AND WHERE ARE THEY?

<u>DOCUMENTS</u>	<u>LOCATION</u>
_____	_____
_____	_____
_____	_____

\_\_\_\_\_  
(Signature)