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These notes are absolutely confidential. Please be as detailed as possible so that we can give you good planning advice. When the word "you" or "your" is used, it includes all those for whom planning has been done.

Date: _____

Your full name: _____

Current home address: _____

Do you own any properties other than your residence? If yes, please list the property addresses:

Home phone: _____ Can a confidential message be left here: Y N

Business phone: _____ Can a confidential message be left here: Y N

Cell phone: _____ Can a confidential message be left here: Y N

Which number is your preferred number? _____

E-mail addresses: _____

Can we send you a quarterly email news letter tailored to you? Please circle one: Yes No

Have there been any changes in your health circumstances? Please describe: _____

Have there been any births, deaths or illnesses in

Your nuclear family: _____

Your extended family: _____

If you have living parents, has their estate planning been updated in the past two years? _____

If you have living children, have they done estate planning? _____

Do you feel that anyone in your family (both nuclear and extended) needs estate planning, elder law planning or business planning? If so, please list them: _____

Have there been any changes in your employment circumstances? If so, please list them: _____

Have there been any changes in your business circumstances? If so, please list them: _____

If you have any business interests, (the following are all business interests: corporate stock, LLC, family business, partnership interest, rental real estate, or sole proprietorship) please answer the next six questions.

Please list your business interests: _____

Have there been any changes that may not be reflected in your current business documents? _____

When did you have your last business meeting and minutes update? _____

Have your business interests been transferred to your revocable trust? _____

Do you have a buy/sell or other succession plan for your business interests? Yes No.

If yes, what updates are needed? _____

Are those individuals that you named as fiduciaries (trustee, executor, power of attorney, guardian, successors to these) in your estate planning documents still good choices for you and your family? If no, please describe: _____

How have your financial circumstances changed since we last met? _____

What issues would you like to discuss with Larry? _____

