Estate Planning Intake Sheet

Ament Law Group, P.C. — Free Initial Consultation

You do not need to have all of this filled out before your consultation. Fill in what you know — we will cover the rest together.

About You

First Name ____ Last Name ____

Date of Birth ____ Phone (best) ____

Home Address ____

City ____ State / Zip ____

Email ____

Occupation / Employer (optional) ____

Marital Status

☐ Single ☐ Married ☐ Widowed ☐ Divorced / Separated

Spouse / Partner's Name ____ Spouse's Date of Birth ____

Prior marriages? (yes / no — if yes, briefly note) ____

Children & Dependents

☐ No children ☐ Children from this marriage only ☐ Children from a prior relationship ☐ Stepchildren

Name	Date of Birth	Your Child?	Special Needs?

Assets (approximate — ranges are fine)

Check all that apply:

☐ Home / Real Estate ☐ Bank / Savings ☐ IRA / 401(k) / Retirement ☐ Life Insurance

☐ Investment / Brokerage ☐ Business Interest ☐ Other significant assets

Rough total value (optional) — under $500k / $500k–$1M / $1M–$5M / over $5M ____

Existing Documents

☐ Will ☐ Living Trust ☐ Financial Power of Attorney ☐ Healthcare POA / Directive

If yes — how old are they / what firm prepared them? ____

Major life changes since then? (divorce, death, new child, moved states) ____

Goals & Concerns

Main concern or goal for this meeting:

Anything else you want us to know: