

LAW OFFICES OF KEVIN M. SMITH, P.A.
1502 N. BROADWAY
WICHITA, KANSAS 67214
316-262-2331
316-262-8862 (FAX)
866-422-3529 (TOLL FREE)

INTAKE FORM FOR WILLS/ESTATE PLANNING MATTERS (for married couples, only fill out one intake form)

Testator Name: _____
last first m.i.

Address: _____
street city state zip

Telephone: _____
home/cell work

SSN: _____ ; DOB: _____

Spouse Name: _____
last first m.i.

ssn dob

Name of Executor/co-Executor (list primary and backup):

last first m.i. ssn

last first m.i. ssn

Name of person(s) who will hold your Power of Attorney (list primary and backup):

last first m.i. ssn

last first m.i. ssn

Name of person(s) who will hold your Health Care Power of Attorney (list primary and backup):

last first m.i. ssn

last first m.i. ssn

APPROXIMATE NET WORTH (NECESSARY FOR DETERMINING WHETHER MORE COMPLICATED ESTATE PLANNING INSTRUMENTS ARE NEEDED, SUCH AS TRUSTS): _____

CHILDREN:

| Name | SSN | DOB |
|----------|-------|-------|
| 1. _____ | _____ | _____ |
| 2. _____ | _____ | _____ |
| 3. _____ | _____ | _____ |
| 4. _____ | _____ | _____ |
| 5. _____ | _____ | _____ |
| 6. _____ | _____ | _____ |
| 7. _____ | _____ | _____ |
| 8. _____ | _____ | _____ |

GRANDCHILDREN:

| Name | SSN | DOB |
|----------|-------|-------|
| 1. _____ | _____ | _____ |
| 2. _____ | _____ | _____ |
| 3. _____ | _____ | _____ |
| 4. _____ | _____ | _____ |
| 5. _____ | _____ | _____ |
| 6. _____ | _____ | _____ |
| 7. _____ | _____ | _____ |
| 8. _____ | _____ | _____ |

OTHER DEVISEES (FRIENDS, RELATIVES, ETC.):

| Name | SSN | DOB |
|----------|-------|-------|
| 1. _____ | _____ | _____ |
| 2. _____ | _____ | _____ |
| 3. _____ | _____ | _____ |
| 4. _____ | _____ | _____ |
| 5. _____ | _____ | _____ |
| 6. _____ | _____ | _____ |
| 7. _____ | _____ | _____ |
| 8. _____ | _____ | _____ |

WHO DO YOU WANT TO SERVE AS GUARDIAN OF YOUR MINOR CHILDREN (INCLUDE AT LEAST TWO FAMILIES/INDIVIDUALS IN CASE YOUR FIRST CHOICE DECLINES): _____

IF YOU DO NOT WANT YOUR CHILDREN/GRANDCHILDREN TO SHARE EQUALLY IN THE INHERITANCE, PLEASE LIST PERCENTAGES FOR EACH CHILD/GRANDCHILD, ALONG WITH SPECIFIC DEVISES FOR **REAL ESTATE** AND ANY OTHER CASH EQUIVALENT ASSETS (BANK ACCOUNTS, BROKERAGE ACCOUNTS, STOCKS AND BONDS) THAT AREN'T SET UP AS JOINT TENANTS WITH RIGHT OF SURVIVORSHIP (E.G., IF THE ASSET GOES TO THE PERSON YOU WANT IT TO GO TO UPON DEATH ALREADY, DON'T

LIST IT HERE): _____

LIST HIGHLY VALUED PERSONAL PROPERTY, E.G., JEWELRY, FIREARMS,
VEHICLES, AND THE PERSON YOU WANT TO INHERIT SAID ITEMS: _____

