

KIRSCHBAUM, NANNEY, KEENAN & GRIFFIN, P.A.  
ESTATE PLANNING INITIAL INFORMATION REPORT

**Note: If married, and if we will be drafting documents for both spouses, each spouse needs to sign this form and attend all meetings.**

Please print clearly. All information is kept strictly confidential.

If you have any current estate planning documents, please bring copies to the first meeting. If you have a divorce decree, separation agreement, or pre-marital agreement please bring copies of those documents as well.

Date: \_\_\_\_\_

Full name: \_\_\_\_\_

Gender: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ US Citizen (yes/no): \_\_\_\_\_ Veteran (yes/no): \_\_\_\_\_

Your cell phone number: \_\_\_\_\_ Your email address: \_\_\_\_\_

If married:

Full name of spouse: \_\_\_\_\_

Gender: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ US Citizen (yes/no): \_\_\_\_\_ Veteran (yes/no): \_\_\_\_\_

Spouse's cell phone number: \_\_\_\_\_ Spouse's email address: \_\_\_\_\_

Date and location of marriage: \_\_\_\_\_

Home address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

County in which you reside (Wake, Johnston, etc.): \_\_\_\_\_

Work address: \_\_\_\_\_

Other telephone number(s) Home: \_\_\_\_\_ Work: \_\_\_\_\_ Other: \_\_\_\_\_

How did you find us? \_\_\_\_\_

Please list full name of any former spouses and dates and locations of divorce: \_\_\_\_\_  
\_\_\_\_\_

How would you like to receive correspondence and draft estate planning documents? (Please check only ONE)

Paper copies via US Mail: \_\_\_\_\_

PDF copies attached to an email: \_\_\_\_\_

PDF copies uploaded to our online secure document portal: \_\_\_\_\_

The option chosen above will be used unless you inform us otherwise. Draft estate planning documents may contain personal information. Please note that PDF attachments to an email may be insecure, and that by selecting that option, you agree to hold our firm harmless in the event those PDF attachments are obtained by unauthorized parties.



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I agree that the information provided herein is complete, accurate, and true to the best of my knowledge. I understand that my attorney will rely on the above responses when recommending an estate plan and any information I have failed to provide on this form or through personal contact with my attorney may result in an inaccurate or incomplete estate plan. I also understand that should circumstances change that would warrant the revision of any information provided herein, I will communicate such circumstances in writing to my attorney as soon as possible.

If I am married, and if Kirschbaum, Nanney, Keenan & Griffin, P.A. is going to represent me and my spouse jointly, then although I have the right to separate representation by separate attorneys, I consent to the dual representation by an attorney with Kirschbaum, Nanney, Keenan & Griffin, P.A., I waive my attorney-client privilege as to my spouse, and I understand that any communications between one spouse and the attorney may be revealed to the other spouse. I understand that both spouses will need to attend all meetings.

If married:

CLIENT:

CLIENT:

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Printed Name*

\_\_\_\_\_  
*Printed Name*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Date*

**As stated above, if you are married, and if we will be drafting documents for both spouses, each spouse needs to sign this form and attend all meetings. If either spouse cannot attend a meeting, then please call to reschedule.**

Please call (919) 848-0420 if you have any questions. Thank you and we look forward to meeting you soon!

**When complete, please keep a copy and mail the signed original to:**

**Kirschbaum, Nanney, Keenan & Griffin, P.A.  
Post Office Box 19766, Raleigh, NC 27619-9766**

or

**Fax to (919) 846-3619**

**or email it back to the paralegal or attorney**