

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

Note: If married, and if we will be meeting with and assisting both spouses, each spouse needs to sign this form.

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): _____

If married: Full name of spouse: _____ Gender: _____ Date of Birth: _____ US Citizen (yes/no): _____ Veteran (yes/no): _____ Date and location of marriage: _____
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Home address: _____

City: _____ State: _____ Zip: _____

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

Work address: _____

Telephone number(s): Home: _____ Work: _____ Cell: _____

How did you find us? _____

If we may contact you by email, please provide email address(es): _____

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

If you have any living or deceased natural-born, adopted, or step children, please list all of their full names, addresses, telephone numbers, gender, dates of birth, and dates of death, if applicable. Please indicate whether they are natural-born, adopted, or step-children:

_____ _____ _____ _____ _____

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I understand 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 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.

If married:

CLIENT:

CLIENT:

Signature

Signature

Printed Name

Printed Name

Date

Date

As stated above, if you are married, and if we will be meeting with and assisting both spouses, each spouse needs to sign this form.

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