



WILLIS & CAGLE LAW FIRM

118 E. Graham Avenue | P.O. Box 1062 | Pryor, Oklahoma 74362 | (918) 876-5605

CLIENT INTAKE FORM ESTATE PLANNING

CLIENT INFORMATION

Legal Name (Last, First, Middle)

Date of Birth

Current Address (Street, City, State, ZIP)

Telephone Number

Best Time of Day to Reach You

Email Address

Employer Name

Employer Phone Number

Employer Address

Occupation / Position

FAMILY INFORMATION

Marital Status

Spouse's Full Legal Name (if applicable)

Child's Full Legal Name	Date of Birth	Relationship	Address (if not living with you)

Prefer to complete your form by hand? Print the form and bring it to your meeting or contact our office at (918) 876-5605 and we'll have one ready for you at your appointment.

EXISTING ESTATE PLANNING DOCUMENTS

Do you currently have a Will, Trust, Power of Attorney, or Advance Directive? (Yes / No — if yes, please list and note approximate date)

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FIDUCIARY DESIGNATIONS

Please identify the individuals you wish to name in the following roles, along with their contact information. Suggested roles: Executor/Personal Representative, Successor Trustee, Agent under Power of Attorney (Financial), Health Care Proxy/Agent, and Guardian for Minor Children (if applicable).

Role	Name	Relationship	Address	Phone Number

ASSETS OVERVIEW

Real Property (Address, Approximate Value, How Titled)

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Bank Accounts, Investments, and Retirement Accounts (Institution, Approximate Value, Current Beneficiary Designations)

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Life Insurance Policies (Company, Approximate Value, Current Beneficiary Designations)

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Business Interests and Other Significant Assets

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ADDITIONAL INFORMATION

Do you wish to make any specific bequests of property to particular individuals or charities? Please describe.

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