



# HORIZON

## TRUST & ESTATE LAW

### CLIENT INTAKE QUESTIONNAIRE

#### CLIENT 1 INFORMATION

Full Legal Name: \_\_\_\_\_ Preferred Name: \_\_\_\_\_

Date of Birth:    /    /    Email: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Home Address: \_\_\_\_\_

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

Gender:  Male  Female Preferred Contact Method: \_\_\_\_\_

Never Married     Married - Date \_\_\_\_\_     Widowed - Date \_\_\_\_\_     Divorced

#### CLIENT 2 INFORMATION

Full Legal Name: \_\_\_\_\_ Preferred Name: \_\_\_\_\_

Date of Birth:    /    /    Email: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Home Address: \_\_\_\_\_

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

Gender:  Male  Female Preferred Contact Method: \_\_\_\_\_

Never Married     Married - Date \_\_\_\_\_     Widowed - Date \_\_\_\_\_     Divorced

#### POTENTIAL NOMINATIONS

**If you were incapacitated, who would you elect to handle your financial affairs?**

Financial Agents	Client 1	Client 2
Initial agent		
1 <sup>st</sup> Back Up		
2 <sup>nd</sup> Back Up		

**If you were incapacitated, who would you want to make healthcare decision for you?**

Healthcare Agents	Client 1	Client 2
Initial agent		
1 <sup>st</sup> Back Up		
2 <sup>nd</sup> Back Up		

**If applicable, who would you want to serve as guardian(s) for minor or disabled children?**

Guardians	Client 1	Client 2
Initial agent		
1 <sup>st</sup> Back Up		
2 <sup>nd</sup> Back Up		



# S U M M A R Y O F A S S E T S

This page helps us understand the overall picture of your estate: what you own, how it is titled, and the approximate value of those assets. Having this information allows us to recommend the type of estate plan that best fits your situation and goals. Without knowing what your estate looks like, it would be difficult to give meaningful guidance or ensure your plan works the way you intend.

Type of Assets	Client 1 Values	Client 2 Values	Joint Values
Bank Accounts (including CDs and Money Markets)			
Non-Retirement Investment Accounts			
Retirement Accounts (401ks, IRAs, 403(b), etc.)			
Pensions			
HSA accounts			
Annuities			
Life Insurance			
529/Custodial Accounts			
Company Interests			
Personal Residence			
Other CO Real Property			
Out of State Real Property			
Timeshares			
Oil, Gas, or Mineral Rights			
Vehicles			
<b>Total Value of Assets</b>			