

Reams & Reams
Attorneys at Law
222 N 7th Street
Grand Junction, CO 81501
www.reamslaw.com
(970) 242 7847

Estate Planning Intake Sheet

GENERAL INFORMATION:

NAME:

First	Middle	Last	Maiden
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ADDRESS:

Street	City	State	Zip
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PHONE NUMBERS:

Home	Work	Cell
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Have you ever completed a will before? Yes No

Is so, in what year was it executed? _____

Has it been destroyed/revoked? _____

RELATIVES

Marital Status Single Married Divorced Widowed Separated

Spouse's Name

First

Middle

Last

Maiden

Have you ever been legally married to anyone else?

Yes

No

Are you legally divorced?

Yes

No

Have you ever been common law married to anyone else?

Yes

No

Former Spouses:

Name, First

Middle

Last

Maiden

Living?

Name, First

Middle

Last

Maiden

Living?

Name, First

Middle

Last

Maiden

Living?

Name, First

Middle

Last

Maiden

Living?

CHILDREN

Please list all of your ~~rxkpi~~ birth children:

Name "Eity, State" "Eqo o gpw" *gz < 'o kpqt A'kuwguA'

Please list all of your adopted children:

Name EkM . 'Ucyg "Eqo o gpw"

*Were they legally adopted through the courts? Yes No

Please list all of your step-children:

Name City, State "Eqo o gpw"

Do you want your stepchildren to be treated the same as your children in your will?

GRANDCHILDREN

Please list all of your grandchildren:

Name City, State "Ego o gpw

Please list any grandchildren you have adopted:

Name Ek\.'Ucvg"' 'Ego o gpw

Please list any grandchildren who were adopted by your children:

Name Ek\.'Ucvg ""Ego o gpw

*Were they legally adopted through the courts? Yes No

Please list all of your step-grandchildren:

Name Ek\.'Ucvg ""Ego o gpw

Do you want your step-grandchildren to be treated the same as your grandchildren in your will?

EXECUTOR

The executor is the person who will be in charge of making sure your will is followed in disposing of your property after your death.

You can list one executor, or more than one to serve together.

It is recommended to have one executor and one backup, in case your first choice is unavailable to serve.

Who would you like to serve as your executor?

Full Name	City, State	Relationship
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1st Choice

2nd Choice

3rd Choice

GUARDIANSHIP

Who would you like to care for any minor children you may leave behind?

Full Name	City, State	Relationship
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1st Choice

2nd Choice

3rd Choice

REAL PROPERTY

Do you own any real property? YES NO
If so- provide address. _____

To whom do you want the land to descend? _____

Do you have any mineral interests on any land? aaaaaaaaaaaaaaaaaaaaaa

"
Do you have any mineral interests on any land? YES NO

Is any of the property above owned in joint tenancy? Please describe below:

Do you have any outstanding Mortgages on any land or homes? YES NO

Address of Mortgaged Property: _____

Who is the mortgage lienholder? _____

Do you have any liens on any other property? YES NO

If so- explain. _____

Do you have any leases on any of your properties-(grazing, mineral)? YES NO

If so- explain. _____

PERSONAL PROPERTY AND WILL SUBSTITUTES

Financial Accounts

Check all that apply:
Please list any beneficiaries.

- Checking Accounts
- Savings Accounts
- Safe Deposit Boxes
- Certificates of Deposit
- Retirement Accounts
- Other Financial Assets (stocks, etc.)

How would you like your personal property distributed?

Would you like to leave anything to charity?

If so- what is the name of the charity? How much would you like to leave to the charity?

Disposition of Pets

Automobiles- List All

Boats, Recreational Vehicles- List All

Jewelry, Guns, Heirlooms, Personal Effects-

List only those you'd like to specifically leave to someone in your will.

For example- "I'd like my wedding ring to go to my daughter Jane."

RESIDUARY ESTATE

This includes all property that you might acquire after the execution of the will. For example, this would include any future homes, bank accounts, mineral interests, etc.

How would you like your residuary estate distributed?

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Hwpgtcn'qt'Dwtkcn'Tgs wguu

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"

"

"

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'OTHER ISSUES NOT ADDRESSED: