



# LYNN LAW GROUP

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## CONSULTATION - ESTATE PLANNING

CLIENT NAME:	DATE:
PREVIOUS ESTATE DOCS:	FORM PREPARED BY:
MARITAL STATUS:                      PREVIOUS MARRIAGE?	RESIDENCY STATE:                      US CITIZENS:
HUSBAND DOB:                                      WIFE DOB:	REFERRAL:
HUSBAND'S CHILDREN:	WIFE'S CHILDREN:
PLANNING ADDITIONAL CHILDREN?	

## REAL PROPERTY

ADDRESS	VALUE	MORTGAGE BALANCE	LIENHOLDER	BENEFICIARY

## MOTOR VEHICLES

AUTOMOBILE (YEAR/MAKE/MODEL)	VALUE	LOAN BALANCE	FINANCE CO.	BENEFICIARY

## SPECIFIC BEQUESTS

ITEM	VALUE	LOCATION	BENEFICIARY

## DEBTS & OTHER ASSETS

CREDIT CARDS	MEDICAL BILLS	FORECLOSURE	AUTOMOBILE REPOSSESSION
STUDENT LOANS	IRS	LAWSUITS/JUDGMENTS:	
RETIREMENT/INSURANCE ACCTS?		OTHER:	

## RESIDUAL

BENEFICIARY	PER STIRPES/REPRESENTATION
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BENEFICIARY	PER STIRPES/REPRESENTATION
BENEFICIARY	PER STIRPES/REPRESENTATION

REPRESENTATIVES		
	HUSBAND	WIFE
PERSONAL REPRESENTATIVE - 1ST		
PERSONAL REPRESENTATIVE - 2ND		
PERSONAL REPRESENTATIVE - 3RD		
POWER OF ATTORNEY - 1ST		
POWER OF ATTORNEY - 2ND		
POWER OF ATTORNEY - IMMEDIATE?		
HEALTH CARE SURROGATE - 1ST		
HEALTH CARE SURROGATE - 2ND		
HEALTH CARE SURROGATE - 3RD		
LIVING WILL REPRESENTATIVE - 1ST		
LIVING WILL REPRESENTATIVE - 2ND		
LIVING WILL - ARTIFICIAL LIFE SUPPORT? (END STAGE; TERMINAL; PERSISTENT)		
TRUSTEE - 1ST		
TRUSTEE - 2ND		
TRUSTEE - 3RD		
IRREVOCABLE TRUST?		
DEEDS?		

RECOMMENDATION/PRICE	
RECOMMENDED	FEE QUOTE
ADDITIONAL NOTES:	