

**Law Office of Carol A. Lawson**  
CONSULTATION QUESTIONNAIRE

**DATE:** \_\_\_\_\_

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**REFERRED BY:** Letter  News  T.V.  Foreclosure Letter  Valley Yellow Pages  Internet   
Bell South Yellow Pages  St. Pete Times  GTE Yellow Pages  Friend  Attorney   
Clearwater Bar  Other  \_\_\_\_\_

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**CIVIL STATUS:** Married  Separated  Divorced  Single  Other

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**WILL INTAKE**

1. Name (legal birth name) \_\_\_\_\_
2. Address \_\_\_\_\_
3. Social Security Number \_\_\_\_\_
4. Date of Birth \_\_\_\_\_
5. Place of Birth \_\_\_\_\_
6. Name of Spouse \_\_\_\_\_
7. Age of Spouse \_\_\_\_\_
8. Date of Birth of Spouse \_\_\_\_\_
9. Spouse's Social Security Number \_\_\_\_\_
10. Years Married to Present Spouse \_\_\_\_\_

11. Name and ages of children by present spouse

- |    | <b><u>Name</u></b> | <b><u>Age</u></b> | <b><u>Present Address</u></b> |
|----|--------------------|-------------------|-------------------------------|
| a. |                    |                   |                               |
| b. |                    |                   |                               |
| c. |                    |                   |                               |
| d. |                    |                   |                               |

e.

12. Name and ages of children by former marriage

|    | <u>Name</u> | <u>Age</u> | <u>Present Address</u> |
|----|-------------|------------|------------------------|
| a. |             |            |                        |
| b. |             |            |                        |
| c. |             |            |                        |
| d. |             |            |                        |

e.

13. Name and address of person(s) you select as your estate's personal representative

|    | <u>Name</u> | <u>Present Address</u> | <u>Relationship</u> |
|----|-------------|------------------------|---------------------|
| a. |             |                        |                     |
| b. |             |                        |                     |
| c. |             |                        |                     |
| d. |             |                        |                     |

e.

14. List all real estate owned

15. If your real estate is owned with another person, state the name and address of the co-owner.

16. In the event of your death, to whom do you wish the real estate to be transferred? Please list the name and address of the beneficiary.

17. As to any personal property (jewelry, works of art, stocks, bonds, notes, cash, etc.), whom do you want to receive said property at the time of your death? Please list the type of property and the name and address of the beneficiary to receive the same.

18. If you have minor children, please list the name and address of the person(s) to be appointed as guardian of the children in the event of your death.

19. Please list the name and address of the person to care for the children's funds in the event of your death.

20. Please list any other considerations you wish to include in your will.