

CAROL LAWSON PA
CONSULTATION QUESTIONNAIRE

DATE: _____

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 _____

CIVIL STATUS: Married Separated Divorced Single Other

Trust Intake

Client Email: _____	Spouse Email: _____
Full Name: _____	Full Name: _____
Mailing Address: _____	Mailing Address: _____
Street Address: _____	Street Address: _____
City: _____ County: _____	City: _____ County: _____
State: _____ Zip: _____	State: _____ Zip: _____
Home Tel: _____ Work: _____	Home Tel: _____ Work: _____
Occupation: _____	Occupation: _____
Employer: _____	Employer: _____
Hourly Wage: _____	Hourly Wage: _____
Social Security Number: _____	Social Security Number: _____
U.S Citizen or Permanent Resident Alien? Yes <input type="checkbox"/>	U.S Citizen or Permanent Resident Alien? Yes No <input type="checkbox"/>
No <input type="checkbox"/>	

Settlor's Name _____

Settlor's Address _____

Settlor's County of Residence _____

Settlor's Place of Death _____

Settlor's Marital Status _____

Settlor's Spouse _____

Settlor's Spouse Address _____

Settlor's Living Children _____

Settlor's Living Children Addresses _____

Date of Will _____

First Witness's Name _____

First Witness's Address _____

Second Witness's Name _____

Second Witness's Address _____

Trustee's Name _____

Trustee's Address _____

Alternate Trustee's Name _____

Alternate Trustee's Address _____

Beneficiaries

Name _____

Address _____

Age _____

Relationship _____

Name _____

Address _____

Age _____

Relationship _____

Name _____

Address _____

Age _____

Relationship _____

Name _____

Address _____

Age _____

Relationship _____

Name _____

Address _____

Age _____

Relationship _____