

BEFORE WE MEET

Getting to Know You & Your Family

This isn't a test, and there are no wrong answers. We ask these questions so we can spend our time together talking about what matters most to you and your family — not filling out paperwork. Please complete what you can and bring this with you (or send it back to us) before your consultation.

DATE OF CONSULTATION

ABOUT YOU & YOUR SPOUSE OR PARTNER

If you're single, just fill in your own side and skip the spouse column.

YOUR FULL NAME

SPOUSE/PARTNER'S FULL NAME

YOUR DATE OF BIRTH

SPOUSE/PARTNER'S DATE OF BIRTH

MARITAL STATUS

☐ Married ☐ Single
☐ Widowed ☐ Divorced

U.S. Veteran

U.S. Citizen

This is my first marriage

YOU

SPOUSE

☐ ☐
☐ ☐
☐ ☐

HOW TO REACH YOU

MAILING ADDRESS

CITY

STATE

ZIP

CELL PHONE

WORK PHONE

YOUR EMAIL

SPOUSE/PARTNER'S EMAIL

Please Send This Back Before Your Consultation

Please email your completed questionnaire to info@legacycounselor.com at least 24 hours before your scheduled consultation, so we can make the very most of our time together.

YOUR FAMILY TREE

Tell us about your children (from this relationship or a prior one) and any grandchildren. If you need more room, feel free to attach a separate sheet.

Child's Full Name	Date of Birth	Child of	Married?	Grandchildren

Is there a child, grandchild, or other loved one with special needs we should know about? ☐ Yes ☐ No

WHAT'S IN YOUR ESTATE, IN BROAD STROKES

Just check what applies — exact numbers and account details can wait until we're working on your plan together.

- | | |
|---|---|
| ☐ Real estate (home, rental, or vacation property) | ☐ Retirement accounts (IRA, 401(k), pension) |
| ☐ Business or partnership interests | ☐ Investments (stocks, bonds, mutual funds) |
| ☐ Life insurance policies | ☐ Bank accounts or certificates of deposit |

APPROXIMATE VALUE OF YOUR ESTATE TODAY (a ballpark is perfectly fine)

- ☐ Under \$500K ☐ \$500K–\$1M ☐ \$1M–\$3M ☐ \$3M+ ☐ Not sure yet

WHERE YOU STAND TODAY

- ☐ I'm ready to move forward and put a plan in place
- ☐ I'm exploring my options and gathering information right now
- ☐ I have a few questions before I'm ready to decide

If you have questions, jot them here so we're sure to cover them together:

ANYTHING ELSE WE SHOULD KNOW?

WHAT MATTERS MOST TO YOU

For each item, circle a number from 1 (not a priority) to 10 (very important). Your first instinct is usually the right one.

1 2 3 4 5 6 7 8 9 10

Having a clear, written plan in place so my family isn't left guessing

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Avoiding the time, cost, and stress of probate court

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Making sure my healthcare wishes are honored if I'm ever unable to speak for myself

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Protecting my savings from being drained by long-term care costs

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Coordinating international assets in my estate plan

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Making sure life insurance proceeds aren't reduced by taxes

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Keeping what I leave my children safe if one of their marriages ends in divorce

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Protecting my estate if my spouse remarries after I'm gone

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Shielding my children's inheritance from future lawsuits or creditors

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Providing for a loved one with special needs without jeopardizing their benefits

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Easing the burden on my family around funeral and final arrangements

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

YOUR SIGNATURE

TODAY'S DATE

SPOUSE/PARTNER'S SIGNATURE

TODAY'S DATE

Thank you for taking the time to share this with us.

Everything you've written here stays between you and our team, and it helps us make the most of the time we spend together. We're looking forward to meeting you.