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LAW OFFICES OF
DONALD H. WHITE, P.C.

WILL INTAKE FORM

Dear Client,

Thank you for considering the law offices of Donald White to help assist you in the creation of your will. Please complete the *Will Intake Form* as thoroughly as possible. If you are unsure about what to put in some areas, please do not fill it out as one of our attorneys will assist you in going through the form at your initial consultation to make sure you understand the entire process and details.

Warm regards,

Donald White Law Firm

*This form is used to efficiently ensure your estate plan meets all your needs and goals.

** All information provided is strictly confidential.

1. PERSONAL INFORMATION

Client 1

Full Name:	
Birthdate:	
Home Address:	
Primary Phone:	
Email:	
Married:	

Client 2

Full Name:	
Birthdate:	
Home Address:	
Primary Phone:	
Email:	
Married:	

If married, is there a prenuptial agreement?

2. CHILDREN INFORMATION

Child 1
Name:
Address:
Phone:
Child 2
Name:
Address:
Phone:
Child 3
Name:
Address:
Phone:
Child 4
Name:
Address:

Phone:

(If more children, your attorney will discuss with you.)

3. RESIDUAL GIFTS

Usually a person will leave the residue of their estate to their spouse outright if the spouse survives them. If the spouse is not living, then to children and or descendants outright.

If you have no spouse, please choose someone or more than one person you would leave your estate to.

Would you prefer residual of your estate to go to your spouse OR other?

If other than a spouse, please name:

4. TRUST

If a trust is included in your estate plan, it will be necessary to name one or more trustees to manage the trust. If you already have in mind people who you want to serve as trustee in your estate, please name them below.

Are you interested in a trust for your estate?

If you are not, please disregard all of section 4.

Trustees

First choice Trustee	
Name:	
Relationship to you:	
Second Choice Trustee	
Name:	
Relationship to you:	

Beneficiary(ies) of the Trust

Who would you want to receive your estate with the created trust in the event you/ and or your spouse do not survive?

Standard law divides your estates equally to heirs.

Would you want your estate to be divided equally among heirs?

If not, please provide some background to who you would want it distributed to.

Attorney purposes only (do NOT fill out)

Ways to divide trust assets:

5. PERSONAL REPRESENTATIVE

Usually a person will name their spouse as their personal representative (executor) of the estate and an alternative if the spouse cannot serve for any reason. Do you favor your spouse being your personal representative? If you do not have a spouse, please choose someone who you would want to carry out your estate in the event you pass away.
Other alternative personal representatives: (please list at least one other for a backup representative)
Name:
Relationship to you:
Phone:
Email:
Address:
Name:
Relationship to you:
Phone:
Email:

Address:

6. REAL ESTATE

Please list any owned real estate:

Address 1:
Address 2:
Address 3:

7. PERSONAL PROPERTY

Please list any owned personal property of value that you would like to be specifically included in your will to give to an heir or devisee.

8. DURABLE POWER OF ATTORNEY

This is a person who will be given authority to handle financial decisions and conduct business affairs on your behalf. The person you choose should be a trusted agent because this power of attorney last during your life, unless you revoke it at a later time. If you have a spouse, typically they will be your primary.

Primary Agent Name:
Address:
Primary Phone:
Email:
Secondary Agent Name:
Address:
Primary Phone:
Email:

9. HEALTH CARE POWER OF ATTORNEY

This is a person you name as agent to make health care decisions for you if you are unable to do so. Please name a primary and a secondary agent. If you have a spouse, typically they will be your primary.

Primary Agent Name:
Address:
Email:
Primary Phone:
Secondary Agent Name:
Address:
Primary Phone:
Email:

