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Thank you for scheduling an appointment with RUBERG LAW, PLLC regarding your estate planning needs. In preparation for this appointment, please complete the information below to the best of your ability with the spellings as you would with them to appear on any documents we prepare for you.

Please bring this sheet with you or email it to our office: melanie@ruberglaw.com
Your appointment scheduled on _____ at: __:__.m. We look forward to meeting you.

Full Name: _____ **DOB:** _____

Spouse Name: _____ **DOB:** _____

Address: _____ **County:** _____

Email: _____ **Phone:** _____

Email: _____ **Phone:** _____

CHILD/CHILDREN (Use Bottom of Pg.2 if more than 4 children)

Name: _____ Age: _____ Name: _____ Age: _____

Name: _____ Age: _____ Name: _____ Age: _____

EXECUTOR/ALTERNATE EXECUTOR

Executor Name: _____ Relationship (if any): _____

Alternate Name: _____ Relationship (if any): _____

GUARDIAN FOR CHILD(REN) (if minors)

Guardian Name: _____ Relationship (if any): _____

Alternate Guardian Name: _____ Relationship (if any): _____

HEALTHCARE SURROGATE

Executor Name: _____ Phone: _____ Relationship (if any): _____

Alternate Name: _____ Phone: _____ Relationship (if any): _____

POWER OF ATTORNEY

Power of Attorney: _____ Relationship (if any): _____

Alternate Power of Attorney: _____ Relationship (if any): _____

To better prepare for your visit, please let us better understand your estate planning needs by answering the following questions:

_____ Are you a United States citizen?
If not, what is your country of Citizenship? _____

_____ Is your spouse a United States citizen?
If not, what is your country of Citizenship? _____

_____ Is this a second or third marriage for you or your spouse?
Note: Partners in second marriages may wish to complete a separate form for each individual.

_____ Do you (or your spouse) own out-of-state real estate (land, houses, rental properties, timeshares, etc.)?
Please identify type and location(s): _____

_____ Are you (or your spouse) a Military Veteran or active Military?
Please identify what branch and years of service: _____

_____ Do you have a special needs child(ren) or do care for a person with special needs?
Please identify what type of special needs: _____

_____ Do you (or your spouse) own a business?
Please identify your business: _____

_____ Do you have prepaid funeral arrangements?
Please identify those arrangements: _____

What else would you like us to know?

