# [Your firm name]

Estate planning - Short web form

Full name

Phone number

Email address

What do you need help with?

☐ New will ☐ Living trust ☐ Update an existing plan ☐ Power of attorney or health care directive ☐ Probate or trust administration ☐ Not sure yet

Tell us a little about what you want the plan to do. A few lines is fine.

How did you hear about us?

☐ Google search ☐ Google Maps ☐ An online ad ☐ Referral from a person ☐ Social media ☐ Other

☐ It is OK to text me about my inquiry (optional)

**[ Send ]**

[Add your firm's disclaimer here, worded by your ethics counsel.]

# [Your firm name]

Estate planning - Intake call sheet

## CONTACT DETAILS

**1.** Full name

**2.** Best phone number

**3.** Email address

**4.** Best time and best way to reach you (call, text or email)

**5.** City and state where you live

**6.** Preferred language. Do you need an interpreter?

## CONFLICT CHECK

**7.** If the plan is for a couple: the full name of the spouse or partner. Both may be clients, so both go on the conflict check

**8.** Full names of the people you may name as executor, trustee, agent under a power of attorney or guardian, and of anyone who may receive a large share

**9.** Have you or a family member ever been a client of this firm?

☐ Yes ☐ No

## THE MATTER

**10.** What do you need help with?

☐ New will ☐ Living trust ☐ Update an existing plan ☐ Power of attorney or health care directive ☐ Probate or trust administration ☐ Not sure yet

**11.** Who is the plan for?

☐ Me alone ☐ Me and a spouse or partner ☐ A parent or relative

**12.** If you are calling for someone else: who are they, what is your relationship, and will they be at the first meeting?

**13.** Do you have a will, trust or power of attorney now? Which ones, the year they were signed, and the state they were signed in

**14.** What has changed since then, such as a marriage, divorce, birth, death, move to another state, or the sale of a home or business?

**15.** Children and grandchildren: first names and ages. Is anyone under 18, or does anyone have special needs?

**16.** In which other states, if any, do you own a home or land?

**17.** In your own words, what do you want the plan to do, and why now?

**18.** Have you already spoken to or hired another attorney about this? If yes, who and when?

**19.** What would a good result look like for you?

## KEY DATES

**20.** Is anything time-sensitive, such as planned surgery, a new diagnosis, a recent death, travel or a closing date?

**21.** Any letter, notice or court paper you have received about this? The date on it, and whether you have it with you

## HOW THEY FOUND YOU

**22.** How did you hear about us?

☐ Google search ☐ Google Maps ☐ An online ad ☐ Referral from a person ☐ Social media ☐ Other

**23.** If a referral: who referred you? If an ad or a search: what were you looking for, or what did you see?

## CONSENT TO CONTACT

**24.** Is it OK for us to call and email you about this inquiry?
□ Yes □ No

**25.** Is it OK to leave a voicemail or message at this number?
□ Yes □ No

**26.** Is it OK to send you text messages about this inquiry?
□ Yes □ No

## FOR THE FIRM TO COMPLETE

Call taken by

Date and time of the call

Result (consultation booked, signed, referred out, declined)

Next step, who owns it and by when

A starting point for your intake team. Not legal advice. Have your ethics counsel review it before you use it.