KODAM
& ASSOCIATES, PC
LAW OFFICE

INTAKE SHEET

ESTATE PLANNING

Date: ____________________ Referred By: ____________________

Prospect Name: ____________________

Co-Prospect Name: ____________________

Street: ____________________

City/State/Zip: ____________________

Prospect Home Phone: ____________________

Prospect Work Phone: ____________________

Prospect Cell Phone: ____________________

Prospect E-Mail: ____________________

Co-Prospect Home Phone: ____________________

Co-Prospect Work Phone: ____________________

Co-Prospect Cell Phone: ____________________

Co-Prospect E-Mail: ____________________

Are you Married: ☐ Yes ☐ No If married, are you living together: ☐ Yes ☐ No

41880 Kalmia Street, Suite 130; Murrieta, CA 92562
Tel: 951-445-4905 Fax: 951-445-4906
www.kodamlaw.com

Any prior marriages: ☐ Yes ☐ No If so, whose marriage (you or your spouse) and how was it concluded:

____

How many children from this marriage: ______________ Any minors? ☐ Yes ☐ No

How many children does the husband have from outside this marriage: ______________

Any minors? ☐ Yes ☐ No

How many children does the wife have from outside this marriage: ________________

Any minors? ☐ Yes ☐ No

Are there any individuals you wish to specifically exclude from your estate planning:

☐ Yes ☐ No

Do either of you own a business: ☐ No ☐ Yes If so, please describe: ____________

____

Do you own a home: ☐ No ☐ Yes If so, how much equity does it have: __________

Do you have any other homes: ☐ No ☐ Yes If so, please describe: ______________

____

How many vehicles do you have: _________________________

Please describe any other significant assets: __________________________________

Any specific questions or concerns you may have regarding estate planning you wish to ensure we go over with you: ______________________________________

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	ASSESSMENT AREAS	YES	NO	N/A
1.	I am confident that my (and my spouse's) retirement funds will be adequate, even if we live very long lives			
2.	In the event of a prolonged disability, I have an alternate source of income to pay my mortgage and other financial obligations			
3.	I have sufficient life insurance protection to maintain our family's current lifestyle after my death?			
4.	I am maximizing my savings within my employer's tax-favored retirement plan?			
5.	I currently have a satisfactory, systematic savings plan?			
6.	I am satisfied with my current investment strategy and the tax efficiency of my investments?			
7.	I have had my automobile and home insurance reviewed annually ensure appropriate coverage?			
8.	I have had my business contracts and records reviewed annually to ensure compliance?			
9.	I have a current estate planning package in place and only wish to have modifications to it?			

OFFICE USE ONLY

Retainer: ☐ H ☐ C ☐ C7 ☐ C13 ☐ CR ☐ EP ☐ FF ☐ WC ☐ Other ______ ☐ PPL

Case Information Sheet: ☐ BK ☐ BK LIT ☐ CIV LIT ☐ EP ☐ EMP ☐ WC ☐ PI-GEN ☐ PI-MV

Other Forms: ☐ CIS ☐ COI ☐ CA ☐ NCA

☐ 523 Issues: ______ ☐ Delay in Filing: ______ BE Name: ______

☐ Key Issues: ______

SOL: ______ Misc Deadlines: ______

 Rev: 01/01/2010

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HELPING INDIVIDUALS AND BUSINESSES WITH THEIR CURRENT AND FUTURE LEGAL NEEDS.