

WEAVER ♦ LOVELESS
LAW

Date: _____ Referred By: _____ Next Appointment Date: _____

Client's Name: _____	Spouse's Name: _____
Address: _____	City: _____ State _____ Zip _____
Phone (Cell): _____ Home: _____	Phone (Cell): _____ Home: _____
E-mail: _____	E-mail: _____
DOB: _____	DOB: _____

LIST ALL CHILDREN (names, addresses, phone numbers -cell/home/work, and email) Use the back of page if needed.

Client's children:

a. _____

b. _____

c. _____

Spouse's children (if different):

a. _____

b. _____

c. _____

POWER OF ATTORNEY (Who will act as your primary and/or secondary agent): Joint Agents Alternate Agents (firm use only)

Client

Primary: _____
Address: _____
Alternate: _____
Address: _____

Spouse

Primary: _____
Address: _____
Alternate: _____
Address: _____

MEDICAL POWER OF ATTORNEY (list who will act in your behalf):

Client

Name: _____
Address: _____
Cell Phone: _____
Relationship: _____
Alternate: _____
Address: _____
Cell Phone (Home/Work): _____
Relationship: _____

Spouse

Name: _____
Address: _____
Cell Phone: _____
Relationship: _____
Alternate: _____
Address: _____
Cell Phone (Home/Work): _____
Relationship: _____

WILL/TRUST (list who will be your Executor/Trustee of your Estate):

Client

Name: _____
Alternate: _____

Spouse

Name: _____
Alternate: _____

ASSET	NAME OF INSTITUTION	CLIENT	SPOUSE	JOINT	TRUST
Checking Account		\$	\$	\$	\$
Savings Account		\$	\$	\$	\$
Annuities		\$	\$	\$	\$
Certificates of Deposit		\$	\$	\$	\$
Stocks & Bonds		\$	\$	\$	\$
Life Insurance		\$	\$	\$	\$
Retirement/Social Security		\$	\$	\$	\$
IRA / 401k		\$	\$	\$	\$
Homestead Mobile Home: _____ Mortgage: _____		\$	\$	\$	\$
Other Real Estate Mobile Home: _____ Mortgage: _____		\$	\$	\$	\$

SELECT SERVICES (Check all that apply):

Client

Cost/Fees

- Will \$ _____
- Revocable Trust \$ _____
- Financial POA \$ _____
- Medical POA \$ _____
- Living Will \$ _____
- Deed (Lady Bird) \$ _____
- Mobile Home Title Transfer \$ _____
- \$ _____

Spouse

Cost/Fees

- Will \$ _____
- Revocable Trust \$ _____
- Financial POA \$ _____
- Medical POA \$ _____
- Living Will \$ _____
- Deed (Lady Bird) \$ _____
- Mobile Home Title Transfer \$ _____
- \$ _____

CONSULTATION NOTES and SPECIAL INSTRUCTIONS (Firm Use Only) / FINANCIAL PLANNER: