FOR THE STRUGGLE

Future Planning Intake Form

Name:	_
Address:	_
Phone Number:	-
Date of Birth:	-
Assets:	
Please list all of your assets. (e.g., Home, Car, Bank Accounts, Life Insurance, Pensions etc.) For bank account and insurance policy, please list the last four digits for each account.	r each

FOR THE STRUGGLE

Future Planning Intake Form

Beneficiaries:

Please state who you'd like to leave each asset to (aka beneficiaries). For each beneficiary, please state his/her Name, Address, Phone Number, Date of Birth, and which asset(s) you'd like to leave to that person. Please note you may leave an asset to multiple people. If you want to leave an asset to multiple people, please list the percentage of each beneficiary's share.

1		
_		
_		
_		
_		
_		
_		
2		
_		
_		
_		
_		
_		
3.		
٥		
-		
_		
_		

FOR THE STRUGGLE

Future Planning Intake Form

Executor of Estate

ease list who you'd li ake sure all distributi dress, telephone nur ecutor/Executrix sho	ons are made acomber, and date of	cording to you f birth. Please	ur wishes. Plea then list a se	ase provide thi condary persor	s person's full n n to serve as	nar
cutor/ executrix sno	uid your primary	selection be	unwilling or u	nable to serve	as your executo	JΓ.