

WILLS, TRUSTS AND ESTATE PLANNING INTAKE QUESTIONNAIRE

Information for Married Couples

If you are married, please note that you have the option of hiring separate attorneys for your estate planning needs. Though the goals of most married persons are the same when it comes to wills, trusts, and estate planning, many married individuals (especially individuals that have children from prior marriages) have differing views on the ownership of property, the identity of beneficiaries, the identity of executors, trustees, guardians, etc. Likewise, some married individuals have secrets -- private, confidential, or embarrassing information that they do not wish to share with their spouse -- information that may be essential to the estate planning process and will therefore have to be disclosed to the attorney and, therefore, disclosed to the spouse if I am representing both spouses. Additionally, sometimes married individuals have "awkward" questions that they desire to ask the attorney -- questions that they would not be comfortable asking in the presence of their spouse, such as how a divorce might affect their estate plan.

By obtaining separate attorneys, you would be able to: (1) share in confidence any secrets or private information with your attorney that may be important to the estate planning process; (2) ask in confidence whatever questions you may have; and (3) receive completely confidential advice and counsel. By having me represent you jointly, you will be waiving and losing all 3 of the above rights with respect to your spouse. If you do decide to obtain separate attorneys, I would be pleased to represent either one of you separately.

By signing below, you acknowledge that you have the right to obtain separate attorneys, but after careful consideration you desire to waive that right and be represented together in connection with our estate planning needs; you understand that you are waiving and losing the rights described above with respect to each other. You also understand that both spouses must be present (either in person or by telephone) for the initial office consultation and all future consultations and signings.

Date

Client Signature

Date

Client Signature

Note: If you decide to have this firm represent both of you, please sign above and then complete the estate intake form jointly (please **do not** fill out two separate forms), using one side for each spouse. For a response that is the same for both spouses, you do not need to fill in both sides - just write "same." Please also note that both spouses **must** be present (either in person or by telephone) for the initial office consultation and all future consultations. Thank you again for choosing me for your estate planning needs. I understand that you have a choice of many fine attorneys in Washington; I am honored by the trust you will be placing in me, and I will strive to do my best to achieve your goals and exceed your expectations.