

First Estate Trust

Protecting and Preserving America's Inheritance

ESTATE PLANNING INQUIRY

Name: _____ Date of Birth: _____ Phone # _____

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Address: _____

E-Mail Address: _____ Best Time to Call: _____

(Q) Do you have a written plan of distribution, such as a Will or Living Trust?

Yes, I have a Will. Yes, I have a Living Trust. No, I have no written distribution plan.

(Q) If you have a written plan of distribution, is that plan current and up-to-date?

Yes, it is current. No, it needs to be updated. Not applicable, I have no plan.

(Q) If you have no written plan of distribution, are you interested in creating one?

Yes, I'd like more information. No, I am not interested.

(Q) Do you have a written plan, appointing someone to care for you, pay your bills, and make health care decisions for you in the event you can't make those decisions yourself?

Yes, I have a plan. No, I am not concerned. No, but I would like more information on this.

(Q) Are you interested in making gifts to charity at your death?

Yes, I want to leave a gift to one or more charities. No, this is not a concern to me.

(Q) Are you interested in ways to maximize the value of your estate for your heirs?

Yes, I'd like more information. No, this is not a concern.

Please contact me to discuss my interest in developing a personal estate plan, as well as associated costs. I understand this is an informational call and I am under no obligation should I choose not to utilize your services. Should I wish to proceed, I understand a Personal Factfinder will be required and a Network Attorney will contact me to conduct a formal estate planning interview.

Signature

Date: _____

Signature

Date: _____

Referred by: _____