



The Spahn Law Firm, PLLC
Matt W. Spahn
Attorney & Counselor at Law

4440 Piedras Dr. South, Ste 145, San Antonio, Texas 78228
PHONE 210-880-4012 FAX 210-853-2036
www.spahnlawfirm.com

Date: _____

INDIVIDUAL WITH NO CHILDREN

GENERAL INFORMATION

First Name Middle Last (Jr, II, III, IV)

Preferred Name

Street Address

City State Zip

County

Phone Numbers and E-mail:

Home Cell E-mail

Date of Birth Social Security Number

Other ID

Are you a US Citizen?

Yes No

EMPLOYMENT INFORMATION

Place of Employment / If Retired, Please Give Us Some Work History

Address

City, State, Zip

Work Phone

Work E-mail

ASSET INFORMATION

Life Insurance / Annuities:

Company	How Titled / Owned	Beneficiary	Value
_____	_____	_____	_____
_____	_____	_____	_____

IRAs, 401 (K)'s, Profit Sharing, etc.:

Company	How Titled / Owned	Beneficiary	Value
_____	_____	_____	_____
_____	_____	_____	_____

Stocks, Bonds, Mutual Funds:

Company	How Titled / Owned	Beneficiary	Value
_____	_____	_____	_____
_____	_____	_____	_____

Cash, CD's, Savings, Checking:

Banking Institute	How Titled / Owned	Authorized Users	Value
_____	_____	_____	_____
_____	_____	_____	_____

Residence:

Address	Mortgage (If Any)	Value
_____	_____	_____

Other Real Estate:

Address	Mortgage (If Any)	Value
_____	_____	_____
_____	_____	_____

Business Interest:

Business	Other Partners / Shareholders	Value
_____	_____	_____

Cars:

Make / Model	Year	Outstanding Note	Value
_____	_____	_____	_____
_____	_____	_____	_____

Notes Where People Owe You Money:

Debtor	Date Due	Value
_____	_____	_____

Jewelry, Furniture, Personal Property:

List any highly valued assets here	Value
_____	_____

TOTAL ASSETS _____

INCOME INFORMATION

Possible Inheritance _____

Salary/Income: _____

Other Income: _____

TOTAL YEARLY INCOME: _____

***Please provide us with copies of your existing Wills, Trust Agreement(s), Powers of Attorney, and Living Wills.**

Did anyone refer you to us? Yes No

If yes, whom may we thank? _____

WHAT TOPICS WOULD YOU LIKE TO DISCUSS AT YOUR APPOINTMENT?

WHO DO YOU WANT TO NAME AS THE EXECUTOR AND ALTERNATE EXECUTORS, OF YOUR ESTATE?

(This is the person responsible for probating your will. This law office would be glad to provide the legal counsel necessary to help the executor.)

1. _____

2. _____

3. _____

WHO DO YOU WANT TO NAME AS TRUSTEE AND ALTERNATE TRUSTEES? IS IT THE SAME AS ABOVE?

(This is probably the same as Executors, above.)

1. _____

2. _____

3. _____

HOW DO YOU WANT YOUR ASSETS TO BE DISTRIBUTED?

Name(s)

Relationship

1. _____

2. _____

3. _____

WHO DO YOU WANT TO NAME AS AGENT ON YOUR (FINANCIAL) DURABLE POWER OF ATTORNEY? *(This is probably the same as Executors, above. This power of attorney gives the person or persons you name the power to sign your name if you are not able to do so. For instance, it can be used to sign a deed or tax return, or to make gifts of your property.)*

(1)

Name:

Address:

City State Zip

(2)

Name

Address

City State Zip

(3)

Name

Address

City State Zip

IS THE ABOVE THE SAME AS WHOM YOU WOULD DECLARE AS YOUR GUARDIAN? *(In case of long term disability, you may have a guardian of your person and estate. It may be the same choice as this power of attorney, it may be whom you name below, the person you give medical power of attorney to. Don't worry, we will discuss.)*

**WHO DO YOU WANT AS TO NAME AS AGENT ON YOUR MEDICAL
POWER OF ATTORNEY?**

(In other words, who do you trust to be able to listen to doctors, then direct the Doctor's actions?)

(1)

Name

Address

Phone

(2)

Name

Address

Phone

(3)

Name

Address

Phone

***WE WILL WANT A SEPARATE HIPAA RELEASE NAMING THOSE ABOVE. ARE
THERE OTHERS YOU WOULD LIKE TO INCLUDE? IF SO PLEASE PROVIDE NAME
ADDRESS AND PHONE NUMBERS:***

***HAVE YOU CONSIDERED AN ADVANCED DIRECTIVE TO PHYSICIANS? (Most
commonly called a living will)***

DO YOU HAVE OTHER ISSUES OR CONCERNS TO DISCUSS?
(Like organ donation or declaring an agent to handle your memorial)

DO YOU PLAN TO BE BURIED OR CREMATED?

Where do you plan to keep your original documents? _____

*You are the focus of our firm. Come
experience dedication and humble
service from the lawyers you like.*