

CLIENT INFORMATION		
Name (first, middle, last)		E-mail Address
Address (street, city, state, zip)		
Home Phone	Work Phone	Cell Phone

How were you referred to our office?

Have you had any prior contact with our office? Yes No

If yes, what was the nature of the contact

Signature

Date

PERSONAL INFORMATION		
	Client	Client #2 if married
Name (first, middle, last)		
Date of Birth		
Country of Citizenship		

CHILDREN FROM THIS MARRIAGE		
Name	Date of Birth	City and State of Residence

CHILDREN FROM OTHER RELATIONSHIPS			
Name	Date of Birth	Child of	City and State of Residence

ANTICIPATED INHERITANCES

- Do you expect to receive any gifts or inheritances? Yes No
 If yes, provide the estimated amount of any such gift or inheritance. \$_____
- Are you a beneficiary of any trust now in existence? Yes No If yes, provide us with a copy of the trust agreement.
- Do you have the right to exercise any other trust now in existence? Yes No
 If yes, please provide us with a copy of the trust agreement.

PRIOR ESTATE PLANNING

- Do you have a will? Yes No If yes, please provide us with a copy.
- Have you ever signed a Community Property Agreement with your current spouse? Yes No
 If yes, please provide us with a copy.
- Do you have a pre- or post-nuptial agreement? Yes No If yes, please provide us with a copy.
- Do you have a trust agreement? Yes No If yes, please provide us with a copy.
- Have you previously executed a Durable Power of Attorney of General Power of Attorney? Yes No
 If yes, please provide us with a copy.

REAL ESTATE			
	PARCEL 1	PARCEL 2	PARCEL 3
Nature <i>(residential, commercial, rental farm, timber, etc.)</i>			
Location of Property <i>(address, county and state)</i>			
Owner <i>(husband and wife, husband only, or wife only, others)</i>			
Manner in which title is held <i>(joint tenants with right of survivorship, tenants in common, or other)</i>			
Acquired before or after marriage			
Estimated fair market value			
Outstanding debt on property			
Date mortgage/contract should be paid in full			

(if you have additional properties, please list time on a separate document.)

DEFERRED COMPENSATION, RETIREMENT AND PENSION PLANS

If you currently have salary earnings, are you deferring income into qualified plans or tax sheltered annuities?

Husband: Yes No _____ % of Salary

Wife: Yes No _____ % of Salary

Please list your retirement plans, pensions, IRA's and tax sheltered annuities. If you are taking distributions from any account, please indicate the amount of annual taxable distributions.

		1	2	3	4	5
Owner <i>(husband or wife)</i>						
Type of Retirement Plan						
Current Account Balance						
Current Amount of Annual Taxable Distributions						
Lifetime Annuities Beneficiary	Primary					
	Alternate					
Death Beneficiary	Primary					
	Alternate					

INTERESTS IN CLOSELY HELD BUSINESS			
	1	2	3
Company Name			
Organizational Structure			
Fair Market Value of the Company			
Your basis in stock in the company			
Does the Company have a retirement plan			
What type of plan?			

* Please provide us with a copy of the entity's bylaws, partnership, buy-sell or stock purchase agreements.

LIFE INSURANCE				
		Policy 1	Policy 2	Policy 3
Name of Life Insurance Company				
Type of Policy (Term, Whole Life, etc.)				
Insured				
Face Amount				
Beneficiaries	Primary			
	Alternate			

LIABILITIES			
Creditor	Debtor	Nature of Debt	Amount

Privacy Notice

The law firm is required to maintain client confidentiality pursuant to the Rules of Professional Conduct administered by the Washington State Bar Association. If you have any question about how we maintain confidentiality, ask Juliet Laycoe.

Representation Not Guaranteed:

An initial consultation with the law firm does not guarantee that the law firm will accept your case or represent you in your legal matter. If the law firm agrees to represent you, the agreement will be pursuant to a written free agreement or confirmed by an engagement letter.