

(PLEASE PRINT) FILL OUT AND BRING WITH YOU TO YOUR APPOINTMENT WITH MICHELE O'BRIEN.

ESTATE DISPOSITION / MANAGEMENT QUESTIONNAIRE

1. NAME(S) (preferred name & a/k/a)

(1)

Date of Birth:

(2)

Date of Birth:

DRIVER'S LICENSE NUMBERS: (1) (2)

Social Security # (only last 4 digits): (1) (2)

2. **ADDRESS: (Street, City, State, Zip Code)**

TELEPHONE CONTACTS:

EMAIL ADDRESSES:

3. **CHILDREN** (adopted or natural) Children not acknowledged? Possible claims as "child"? :
NAMES **DATES OF BIRTH** **SPECIAL NEEDS?**

4. **GUARDIAN (ANY CHILD UNDER 18, OR LEGALLY INCAPACITATED ADULT) INITIAL AND SUCCESSOR(S)**

5. Executor(rix) (or CoExecutors)/Successor Executors:

6. **TRUST(S)** YES NO TYPE / REASON:

INITIAL TRUSTEE/ CO-TRUSTEES AND SUCCESSORS

7. **REVIEW PERSONAL & FINANCIAL MANAGEMENT DOCUMENTS?** YES ___ NO ___

OTHER CONSIDERATIONS:

Any written Property Agreements?

Separate or Community property considerations?

Own real property in other states?

Other considerations?

Michele O'Brien, Attorney at Law. BOARD CERTIFIED IN ESTATE PLANNING AND PROBATE LAW BY THE TEXAS BOARD OF LEGAL SPECIALIZATION
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