

Law Office of Ray Kowalczewski, P.A.

PERSONAL INFORMATION

	HUSBAND	WIFE
Name This is the name I will use on your documents.		
Residence Address		
City, State, Zip		
Citizenship		
Residence Telephone		
Employer/Bus. Name		
Business Address		
City, State, Zip		
Position		
Business Telephone		
Birth Date		
Place of Birth		
Social Security No.		
E-mail Address		
Marriage: Date: _____ Place (City, State, Country): _____ What states (other than Kansas and Missouri) have you live in while being married to your current spouse? Please give dates.		
Pre-marital (or post-marital) agreement? If yes, please supply copy.		
Husband previously married? _____ How many times? _____		
Wife previously married? _____ How many times? _____		
For each prior marriage of either spouse, indicate name of prior spouse, date of marriage, date of termination, reason for termination (divorce, death) and, if divorced, whether prior spouse is living. Please supply copy of any divorce decrees.		

FAMILY INFORMATION (continued)

Provide information as to any adopted children or grandchildren, children of prior marriages and other relatives or friends to be considered in estate plans.

Questions about your children (and grandchildren):

(Please circle Yes or No. If yes, please briefly explain if you want to make special provisions for them in your estate plans)

- | | | |
|---|-----|----|
| 1. Are any of your children (or grandchildren) adopted? | Yes | No |
| 2. Have either of you ever given up a child for adoption? | Yes | No |
| 3. Do any of your children (or grandchildren) receive governmental support or benefits? | Yes | No |
| 4. Do any of your children (or grandchildren) have special educational, medical, or physical needs? | Yes | No |
| 5. Do any of your children (or grandchildren) have a learning disability? | Yes | No |
| 6. Are any of your children (or grandchildren) institutionalized? | Yes | No |

DISTRIBUTION OF YOUR ASSETS

To assist you in determining how you would like your assets distributed upon your death, I have prepared the following worksheet. Please give some thought to the questions below and write down your responses. We will fully discuss your thoughts on these issues in our first meeting.

1. In general terms, how would you like your assets distributed?
 - a. To your spouse?
 - b. If your spouse does not survive you, to your children? Equally or unequally? If unequally, what percentages to each child?
 - i. What if one (or more) of your children does not survive you, to your grandchildren (if any) or other relatives?
 - ii. Would like your child's (or grandchild's) share to be held in a trust? If so, for how long?
NOTE: I will explain these options in more detail at our first meeting.
 - c. Do you have any charities you would like to benefit at your death?
 - i. Direct beneficiary or contingent beneficiary?

2. If you have any other ideas about how you would like your assets distributed, please describe.

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FINANCIAL INFORMATION

In order to give you accurate advice about your estate planning options, I need to have an understanding of your assets and their approximate values, as well as the exact way they are owned (e.g., individually, joint tenancy, tenancy in common, or by either individual as community property). Please provide the requested information in as much detail as you can. We will discuss your assets in more detail in our meeting, but this information will serve as a starting point for our discussion. Please give careful consideration to how each asset is owned. Please include all property owned with individuals other than your spouse (brothers, sisters, business partners, etc). Provide current estimated values, in multiples of \$1,000.

<u>ASSETS</u>	HUSBAND	JOINT TENANCY	WIFE
Cash & Notes	\$	\$	\$
Real Estate			
Securities (Stocks, Mutual Funds, Bonds, etc.)			
Proprietorships/partnerships/ Limited Liability Companies			
Life insurance			
Retirement assets/plans			
Tangible personal property			
Miscellaneous			
TOTALS	\$	\$	\$
<u>LIABILITIES</u>			
Mortgages			
Loans/notes			
Other liabilities			
TOTALS	\$	\$	\$
NET WORTH	\$	\$	\$

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A Word about Fees . . .

Our initial consultation fee is \$150. In this consultation, I will provide you with extensive and invaluable legal advice about the estate planning process. I will educate you about the options you have in managing your assets during your life and distributing your assets upon your death. We have found that our clients greatly appreciate this education-based approach to estate planning. The initial consultation usually takes one to two hours.

Due to the custom nature of the estate planning process, it is impossible for me to quote you an exact fee for planning your estate before I meet with you to discuss your individual goals and preferences. Upon the conclusion of our initial consultation, I will give you a fee proposal either verbally or in writing (for complicated estates). For most estate planning engagements, I will be able to quote a flat fee for preparing the documents. Re-titling your assets, if necessary, can be done either by you (with instructions from me) or can be undertaken by my Law Office on an hourly rate basis.

We can move as quickly or as slowly as you want through this process. My typical estate planning engagement takes thirty to sixty days to complete, depending on the client and the estate plan you determine is best for you. An estate plan based on a Will involves two meetings (the initial meeting and a signing the documents meeting) and several phone calls in-between. An estate plan based on a Trust usually involves three meetings (the initial meeting, a question and answer meeting, and a signing the documents meeting) and numerous phone calls in-between. The question and answer meeting is also helpful for you to give me feedback on the first drafts of your documents.

I will begin drafting your documents upon receiving one-half of my quoted fee and sufficient information to draft meaningful documents. The remaining one-half of the fee will be due when you sign the documents. If you decide to have my Law Office prepare your estate planning documents, the initial consultation fee will be credited toward the flat fee for preparing your documents and deducted from this second payment. Any hourly rate work will be billed on a monthly basis and payment is due upon receipt. The hourly rate work will be undertaken by my Law Office only after written consent is obtained from you. During this process, I will ask you to sign a fee agreement to minimize any confusion about my fee.

ACKNOWLEDGMENT

I/We understand and acknowledge that the Law Firm of Ray Kowalczewski, P.A. will not take any additional action on my/our behalf until such time as a fee retainer is paid by me/us and a fee agreement is signed by me/us.

I/We further understand and acknowledge that even though the Law Firm of Ray Kowalczewski, P.A. is providing an initial consultation for a fee, the Law Firm of Ray Kowalczewski, P.A. is not obligated to take any action on my/our behalf until such time as a additional fee retainer is paid by me/us and a fee agreement is signed by me/us.

Signature
Printed Name:

Date

Signature
Printed Name:

Date