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# INTAKE DISCUSSION WORKSHEET

A guide to help you prepare for your intake discussion

This worksheet is optional—you do not need to turn it in. It is to be used as a guide. Visit the "Client Resources" page of our website for more information and helpful videos.

## 1 General Contact Information

What is your name, phone number, email, and your address (and mailing address if it is different from your home address)?

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## 2 Family Information

What is your legal name (the name you would use to open up a bank account) and the legal names of any spouse and children (if any)?

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## 3 Beneficiary Information

Who would you like to inherit your assets after you become deceased? And how? (e.g., lump sum, at a certain age, etc.) We can discuss any ideas you might have.

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**4 Trustees**

Who will act as the administrator(s) of your estate after your death (and backups)? You can also name multiple individuals to act together.

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**5 Powers of Attorney (Financial and Medical)**

Who will take care of your affairs should you be unable to care for yourself? You can choose different individuals for financial and medical affairs. Multiple individuals can act together.

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**6 Miscellaneous**

What is your end-of-life decision (i.e., "Pull the Plug")? Are you an organ donor? If you have minor children, who would be the guardian(s)?

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