

OFFICE USE  
Quoted: \_\_\_\_\_  
Date: \_\_\_\_\_ Initials: \_\_\_\_\_  
Referrer Thanked \_\_\_\_\_



OFFICE USE  
Conflicts Checked \_\_\_\_\_  
Conflicts Created \_\_\_\_\_  
Date: \_\_\_\_\_ Initials: \_\_\_\_\_

Thank you for choosing The Garde Law Firm, PLLC. Please take a few moments to answer some questions about your situation. This will help me efficiently assist you today and in the future.

Today's Date: \_\_\_\_\_

Your full name: \_\_\_\_\_ DOB: \_\_\_\_\_

Other names used: \_\_\_\_\_

Home Address: \_\_\_\_\_  
\_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Spouse full name: \_\_\_\_\_ DOB: \_\_\_\_\_  
Other names used: \_\_\_\_\_  
Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Do you have any existing Wills, Powers of Attorney, or Trusts? Yes No

State in which the documents were prepared: \_\_\_\_\_ Date prepared: \_\_\_\_\_

What is the reason for our consultation today? (Check all that apply):

Last Will & Testament Trust Beneficiary Deed Power of Attorney

Living Will / Advance Directive Other: \_\_\_\_\_

How did you hear about us? (Please be specific): \_\_\_\_\_