



MCCARTY-LARSON, PLLC

P.O. Box 869
300 North 8th Street, Suite 200
Midlothian, Texas 76065
972-775-2100

ESTATE PLANNING CLIENT INFORMATION FORM

Instructions: Please complete the following form in its entirety. Email the form to calla@mccartylarson.com. You will receive an email with a quote and any questions we may have to complete that quote. Once payment is provided, via online, we will draft your documents and send them to you via email for review. Once you have reviewed and we have finalized all documents, we will schedule a video conference to execute the documents. You will receive the finalized documents with all required signatures once complete.

Full Legal Name 1: _____

Full Legal Name 2: _____

Home Address: _____

Home Phone: _____ Cell Phone: _____

Email 1: _____ Email 2: _____

Last 4 digits of DL#: 1) _____ Last 4 digits SS #: 1) _____
2) _____ 2) _____

Full Legal Name of Child: _____

Date of Birth of Child: _____

Full Legal Name of Child: _____

Date of Birth of Child: _____

Full Legal Name of Child: _____

Date of Birth of Child: _____

Full Legal Name of Child: _____

Date of Birth of Child: _____

****If children are not from both parents, please add in the Notes Section****

Executors (Please name three individuals, in consecutive order, you would like to be in charge of your Estate- if you would like your spouse named first please include them here.)

Full Legal Name of Executor: _____

Full Legal Name of Executor: _____

Full Legal Name of Executor: _____

IF CHILDREN ARE MINORS: Please list three potential Guardians, in consecutive order. Do not include your spouse.

Full Legal Name of Guardian: _____

Address and Phone Number: _____

Full Legal Name of Guardian: _____

Address and Phone Number: _____

Full Legal Name of Guardian: _____

Address and Phone Number: _____

Disposition of Estate: Please list who you would like to receive your estate. Your spouse is not automatic in regard to your share of certain property, so they must be listed. Additionally, please include what share you would like them to receive. Example: three children would each receive 1/3.

Full Legal Name of Recipient: _____

Share Recipient is to receive: _____

Full Legal Name of Recipient: _____

Share Recipient is to receive: _____

Full Legal Name of Recipient: _____

Share Recipient is to receive: _____

Specifics: If you have any specific bequests, please list them here. Example: I would like my niece, and only my niece, to receive my silver.

Agents: These individuals will be in charge of making decisions regarding your health and your personal matters in the case you become incapacitated. This is only in effect while you are living yet incapacitated. The Powers of Attorney do not survive you.

Full Legal Name of Agent: _____

Address and Phone Number: _____

Full Legal Name of Agent: _____

Address and Phone Number: _____

Full Legal Name of Agent: _____

Address and Phone Number: _____

Please understand that non-probate assets, such as life insurance, stocks, 401k's all pass outside of the estate and probate process. The beneficiary designations for these types of accounts are done with the agency themselves, not through your will.

May we send correspondence/documents/invoices to you by email? _____

Notes or specific requests you would like to add: _____
