



STONEMYERS LAW PLLC
estate & business planning

Client Information Sheet

	You	Spouse/Partner
Full Legal Name/Preferred Name		
Birthdate/Location		
US Citizen? (yes/no) If Naturalized, Date of Citizenship		
Occupation/Employer		
Preferred Phone and email		
Home Address (Include County)		
Previously Married? Y/N (Divorce/Widow)?		
Children (Full name, DOB, Address if not with you)		
Do you own a business? If so, name and type?		
Assets located outside of Texas? Location?		
What legal service(s) are you seeking?		
Do you have a financial advisor? If so, who is your advisor?		
What is your anticipated time frame?		
How did you hear about our office?		
How much do you think this work should cost		
Do you have a financial advisor? If so, who is your advisor		

Do you have specific questions you would like addressed?	
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