



Client Information Sheet

Full Legal Name (and preferred name)	
Birthdate/Location	
US Citizen? (yes/no) If Naturalized, Date of Citizenship	
Occupation/Employer	
Preferred Phone and Email	
Home Address (city/state/zip/county)	
Do you own a business? If so, name and type?	
Assets located outside if Texas?	
Children? (Name, Birthdate, Address)	
Currently Married? Name, Date of Marriage? Prior Marriage? (Name, Date of Marriage, Divorce Date or Date of Death of widowed)	

What legal service(s) are you seeking?	
What is your anticipated time frame?	
How did you hear about our office?	
Do you have a financial advisor? If so, who is your advisor?	
How much do you think this work should cost?	
Do you have specific questions you would like addressed?	