

**Client Information Sheet**

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| 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? |  |