3309 Slaughter Lane West, Austin, Texas 78748 | 512-553-9095 |melissa@stonemyers.com

**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 specific questions  you would like addressed? |  |