

Waltemath Law Office

Date _____

Client 1

Full Name: _____ **Legal**

First Middle Last

Address _____

— Street City State Zip County

Best Contact Phone Number _____ Phone _____ Cell Home

Birthdate _____ Social Security # _____ / _____ / _____ Years In Colorado _____

Employer _____ Position _____

— Employer Address _____ Gross Monthly Income \$ _____

Email Address: _____

Veteran: Yes No

Client 2

Full Legal Name: _____

First Middle Last

Address _____

— (if different) Street City State Zip

Relationship: Spouse Partner Sibling

Best Contact Phone Number _____ Phone _____ Cell Home

Email Address: _____

Birthdate _____ Social Security # _____ / _____ / _____ Years In Colorado _____

Employer _____ Position _____

— Employer Address _____ Gross Monthly Income \$ _____

Veteran: Yes No

Full Legal Name Of Children: (If deceased, please provide Date of Death)

Children belong to:
Husband & Wife Husband Only Wife Only

1. _____ Date of Birth _____
 First Middle Last mm/dd/yyyy

Phone Number: _____

2. _____ Date of Birth _____
 First Middle Last mm/dd/yyyy

Phone Number: _____

3. _____ Date of Birth _____
 First Middle Last mm/dd/yyyy

Phone Number: _____

4. _____ Date of Birth _____
 First Middle Last mm/dd/yyyy

Phone Number: _____

5. _____ Date of Birth _____
 First Middle Last mm/dd/yyyy

Phone Number: _____

How Did You Hear About Us: _____

Have You Or Any Family Members, Relatives, Former Spouses, Or Friends Ever Used the Services of Tamra K. Waltemath, Esq. Before? Yes No

If Yes, Who? _____

What Are You Interested In Talking About Today?

- Last Will & Testament (Will)
- General Durable Power of Attorney (Financial)
- Medical Durable Power of Attorney (Medical)
- Living Will
- Trust
 - Revocable Irrevocable
 - Family Trust
 - Trust for grandchildren
 - Disability Trust
 - Trust that cannot be changed when 1st spouse dies
 - Life Insurance Trust
 - Disclaimer Trust (for taxable estates)
- Avoiding Probate
- Appointment of Guardian for Minor(s)
- Child with Special Needs
- Nursing Home Rights
- Medicaid Asset Protection

- Disposition of last remains
- Beneficiary Deed
- Life Estate Deed