

**Gary Cunha, P.C.**  
Confidential Client Information Sheet

Name	DOB
Spouse	DOB
Address	
City, St, Zip	
<input type="checkbox"/> Rent <input type="checkbox"/> Buying Home <input type="checkbox"/> Own Home (paid off) <input type="checkbox"/> live with friends/relatives	
Home Phone	
Cell Phone his	hers
Work Phone his	hers
Email his	hers
His Social Security #	TX Drivers License#
Her Social Security #	TX Drivers License#
If you are here on behalf of someone else, their Name	

I am interested in (check all that apply):

- | Family Law                                     | Estate Planning                              | Business/Civil                                    | Criminal                                  |
|--|--|---|---|
| <input type="checkbox"/> Divorce/Annulment     | <input type="checkbox"/> Wills & Trusts      | <input type="checkbox"/> Business                 | <input type="checkbox"/> Misdemeanor      |
| <input type="checkbox"/> Child Custody/Support | <input type="checkbox"/> Living Will         | <input type="checkbox"/> Taxation                 | <input type="checkbox"/> Felony           |
| <input type="checkbox"/> Name Change           | <input type="checkbox"/> Power of Attorney   | <input type="checkbox"/> Personal Injury          | <input type="checkbox"/> Juvenile         |
| <input type="checkbox"/> Adoption              | <input type="checkbox"/> Healthcare PoA      | <input type="checkbox"/> General Civil Litigation | <input type="checkbox"/> Class C Citation |
| <input type="checkbox"/> Pre-Marital Counsel   | <input type="checkbox"/> Elder Care Planning | <input type="checkbox"/> Debt Relief/Bankruptcy   | <input type="checkbox"/> Traffic Ticket   |

Please give a brief description of your legal problem:

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**WAIVER & CONSENT**

I certify that I am not currently represented by an attorney with regard to the matter I am here for today, or if I am represented, I am here for a second opinion. I understand that all matters discussed with the attorney are subject to confidentiality under the attorney-client privilege. The attorney may not discuss the matters with third parties without my consent except as needed to carry out representation of me. The law also requires the attorney to disclose my confidential information if: ordered by the court, the Texas Disciplinary Rules, other law, to defend against civil or criminal charge, to prevent the client from committing fraud or criminal act, or to rectify fraud or criminal acts. I further certify that I will be truthful with the attorney with regard to potential conflicts of interest and all other matters. I realize it is in my best interest to be honest with the attorney so that I get the best legal advice.

Date: \_\_\_\_\_ Sign: \_\_\_\_\_

How did you hear about us? Yellow Book / Waco Pages / web search / Facebook / referral/other: \_\_\_\_\_

**Gary Cunha, P.C.**  
Attorney and Counselor at Law

This form should be used to allow me to prepare your will. Please answer all questions as they apply so I can accurately prepare your will.

Please **PRINT CLEARLY** all answers or put N/A if not applicable to you.

Legal Name: \_\_\_\_\_ Male/Female

County of Residence: McLennan Bell other: \_\_\_\_\_

Name of Spouse: \_\_\_\_\_

For Children: if you are male, please list the child's mother, if you are female, please list the child's father. List all of your children, both by birth and by adoption, and include (or purposely exclude) those not yet born. If you have special instructions (such as giving a child a disproportionate amount of your estate) provide them

Child's Full Name	Child's Date of Birth	Child's other Parent	Special Instructions

Age you feel children are old enough to inherit: 20 25 30 35 other: \_\_\_\_\_  
(note: you may select multiple years if you want kids to inherit partial amounts at different ages)

Do you wish to use this will to put money into a currently existing trust? Y / N

For general bequests, property goes to:  spouse, then children or  other \_\_\_\_\_

Do you want to add a "no contest clause" to your will? Y / N

Do you want to add funeral instructions? Y / N \_\_\_\_\_

Do you want to add a contingent trust provision? Y / N if yes, (circle) lump sum / 3 point

The **EXECUTOR** is the person who will manage your estate, pay estate obligations, and file estate tax returns. You should choose your executor based on that information. You want someone who has business savvy or perhaps enlist professional help.

Person you desire to be your executor: \_\_\_\_\_

his/her relation to you: \_\_\_\_\_

Backup executor (just in case): \_\_\_\_\_

his/her relation to you: \_\_\_\_\_

