Gary Cunha, P.C.

Confidential Client Information Sheet

Name	DOB				
Spouse	DOB				
Address					
City, St, Zip					
□ Rent □ Buying Home	Own Home (paid of	ff) \Box live with friends/relation	ives		
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		
Divorce/Annulment	□ Wills & Trusts	□ Business	□ Misdemeanor		
□ Child Custody/Support	□ Living Will	\Box Taxation	□ Felony		
□ Name Change	\Box Power of Attorney	Personal Injury	□ Juvenile		
□ Adoption	□ Healthcare PoA	□ General Civil Litigation	□ Class C Citation		
□ Pre-Marital Counsel	Elder Care Planning	□ Debt Relief/Bankruptcy	□ Traffic Ticket		
Please give a brief description of your legal problem:					

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

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:

The **TRUSTEE** is the person or entity which will manage any trusts which are set up in your will. Trusts are typically set up for minor children so that minor children do not inherit assets that they will frivolously spend. Trusts can also be set up for tax benefits on larger estates. The trustee can be anyone, but it is usually recommended to have a professional as they will have to manage the trust assets, making financial decisions to preserve and grow the trust, render accountings, and prepare tax returns.

Person you desire to be your trustee:		
his/her relation to you:		
Backup trustee (just in case):		
his/her relation to you:		
2 nd Backup trustee (just in case):		
his/her relation to you:		
The GUARDIAN is the person or couple wh	ich you	prefer to raise your minor children.
Guardian name (and spouse): I prefer to have the husband / wife as the prin their relation to you:		
Backup guardian (just in case):		
his/her relation to you:		
	on. Gei	ts and general gifts. Specific gifts are specific neral gifts are the remainder of your property, nerally, without regard to who gets what.
Please specify, if any, what specific gifts you	wish to	o make:
Gift		To Who?