



**Pro Bono Estate Planning Program Intake Sheet**

<b>Full Legal Name:</b>		<b>Date:</b>	
<b>Current Mailing Address:</b>		<b>Phone (Cell):</b>	
<b>Street:</b>		<b>Phone (Home):</b>	
<b>City/State:</b>		<b>Email:</b>	
<b>Zip code:</b>		<b>Date of Birth:</b>	
<b>Type of Estate Planning you are interested in?</b>		<b>Marital Status:</b>	
<input type="checkbox"/> Will <input type="checkbox"/> Power of Attorney for Health Care <input type="checkbox"/> Power of Attorney for Finances		<input type="checkbox"/> Married <input type="checkbox"/> Single (never married) <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed	
<b>Have you or your spouse had any of the following items prepared in the past?</b>		<b>What is your asset level (including life insurance)?</b>	
<input type="checkbox"/> Will <input type="checkbox"/> Trust <input type="checkbox"/> Power of Attorney		<input type="checkbox"/> \$0.00-\$250,000 <input type="checkbox"/> \$250,000- \$1,000,000 <input type="checkbox"/> Greater than \$1,000,000	
<b>Why are you interested in participating in this program?</b>		<b>What is your household annual income?</b>	
<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> \$0.00-\$50,000 <input type="checkbox"/> \$50,001-\$100,000 <input type="checkbox"/> Greater than \$100,000	
<b>Are you under Guardianship or Conservatorship?</b>	<b>Do you have adult children?</b>		
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> NO		
	<b>Do you have minor children?</b>		
	<input type="checkbox"/> Yes <input type="checkbox"/> NO		
<b>If selected for an initial meeting, which date works best for you?</b>			
<input type="checkbox"/> Feb. 20 (5pm-8pm) <input type="checkbox"/> Feb. 21 (5pm-8pm) <input type="checkbox"/> Feb. 22 (5pm-8pm)			

**Filling out this Application Intake Sheet does not guarantee services**

Either email this form to [mulawpbpepp@missouri.edu](mailto:mulawpbpepp@missouri.edu) or drop it off at the Family Impact Center, 105 E. Ash Street, Suite 200, Columbia, MO 65203

Questions? Call 573-882-2428 or email [mulawpbpepp@missouri.edu](mailto:mulawpbpepp@missouri.edu)