

LYNNA DEAN
ATTORNEY AT LAW

CLIENT INTAKE SHEET

TODAY'S DATE: _____ REFERRED BY: _____

YOUR NAME(S): _____

YOUR ADDRESS: _____

PHONE NUMBER(S): _____ (HOME) _____ (WORK)

_____ (CELL) _____ (ALTERNATE CONTACT)

IS THIS APPOINTMENT FOR INFORMATION REGARDING:

_____ ESTATE PLANNING (i.e., TRUST, WILLS, POWERS OF ATTORNEY,
ETC.)

_____ CONSERVATORSHIP (YOURSELF OR SOMEONE ELSE)

_____ TRUST ADMINISTRATION

_____ PROBATE

_____ MEDI-CAL PLANNING

_____ DOCUMENT REVIEW OR UPDATE OF DOCUMENTS

_____ LITIGATION REGARDING ANY OF THE ABOVE ISSUES

_____ OTHER (PLEASE EXPLAIN) _____
