

Wollinka & Wollinka

Attorneys at Law

ESTATE PLANNING PROFILE (Please Complete Pages 1 & 3; sign & date Page 4)
Personal & Confidential

➤ Pinellas Office: 3204 Alternate 19 N, Palm Harbor, FL 34683
Phone: (727) 781-5444

➤ Pinellas Office: 325 Belcher Road, Clearwater, FL 33765
Phone: (727) 781-5444

➤ Pasco Office: 10015 Trinity, Boulevard, Trinity, FL 34655
Phone: (727) 937-4177

I. PERSONAL INFORMATION

1. Date	Referred By:	
2. Your Name: (as it should appear on legal documents)	Birthdate/Age:	SS#:
Spouse's Name: (as it should appear on legal documents)	Birthdate/Age:	SS#:
3. Home Address:	E-Mail:	
City, State, Zip:	County:	Phone:
4. Business / or Second Home:		
City, State, Zip:	County:	Phone:
5. Date & Place of Marriage:	Date residence established in FL:	
6. Husband Occupation:	Wife Occupation:	
7. Husband Citizenship:	Wife Citizenship:	
8. Any Prior Marriages?	Details:	
9. Funeral Arrangements: Yes _____ No _____	Prepaid: Yes _____ No _____	
Name of Funeral Home:	Location/:	

II. CHILDREN (Please indicate if a child is a stepchild or if adopted)

Child's Name: (as it should appear on legal documents)	Birthdate:	Address:	Phone:

Grandchildren: (Complete only if you intend to make gifts or distributions to them)

Child's Name: (as it should appear on legal documents)	Birthdate:	Address:	Phone:

(Over)

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III. DESIGNATIONS

1. Will/Trust:

Tangible Property Beneficiary(ies):

Homestead Property Beneficiary(ies):

Specific Beneficiary(ies):

Residual Beneficiary(ies):

Personal Representative:

2. Power of Attorney Designation:

Husband: YES / NO / NA

Name:

Relationship:

Wife: YES / NO / NA

Name:

Relationship:

3. Health Care Surrogate:

Husband: YES / NO / NA

Name:

Relationship:

Wife: YES / NO / NA

Name:

Relationship:

4. Living Will:

Husband: YES / NO / NA

Wife: YES / NO / NA

*****NOTE*****

A minimum retainer of \$250.00 must be paid prior to the preparation of any estate planning documents.

IV. ATTORNEY'S NOTES

V. ASSET INVENTORY

(Instructions: Please list the present market value and which spouse owns the asset.)

<u>ASSETS</u>	<u>HUSBAND</u>	<u>WIFE</u>	<u>JOINT</u>
Your residence	\$	\$	\$
Other real estate			
Bank accounts (checking & savings)			
Other cash accounts (money market funds, brokerage cash accounts)			
Stocks, bonds, and mutual funds (publicly traded)			
Closely held stock (indicate if S-corporation or stock subject to a shareholder agreement)			
Money/Loans (other people owe me)			
Partnership interest (estimated market value)			
Life Insurance (face value)			
Annuities			
IRA's			
Other Retirement Plans			
Personal Property (replacement value of jewelry, autos, etc.)			
Collectibles (art, precious metals and the like)			
Other assets (trusts, power of appointments, misc.)			
TOTAL ASSETS	\$	\$	\$
LIABILITIES/MORTGAGES	\$	\$	\$

What is the name of your:

C.P.A.: _____

Financial Advisor: _____

Address: _____

Address: _____

Phone: _____

Phone: _____

**VI. MISCELLANEOUS ITEMS, INCLUDING
DISCLOSURE OF POTENTIAL CONFLICT OF INTEREST
AND WAIVER BY CLIENT**

(Required In Second Marriages)

Unless otherwise agreed when husband and wife retain an attorney for representation in common legal matters -- specifically, seeking assistance with their estate planning -- it is presumed that the attorney represents the husband and wife jointly. A joint representation, by its very nature, is grounded on the premise that the co-clients have jointly agreed to retain the same attorney in order to achieve mutual goals. The undersigned, husband and wife, hereby acknowledge that **DAVID J. WOLLINKA, of WOLLINKA & WOLLINKA, Attorneys at Law** ("Wollinka") has advised them that a potential conflict of interest exists between the Husband and Wife and/or their heirs, particularly upon the death of the first to die. Said conflict may arise from a subsequent difference of opinion as to how the parties' estate shall be distributed, separate heirs (as in the case of a second marriage) and/or other factors. *For example*, in a second marriage where each of the spouses has children from a prior marriage, the surviving spouse could change his or her will after the death of the first spouse to eliminate the deceased spouse's children as beneficiaries. Unless otherwise agreed, it is presumed that information relating to the subject of the representation will be shared by the joint clients. However, the lawyer representing husband and wife jointly has a duty to inform the clients of the rules governing lawyer confidentiality, in particular that, absent agreement to the contrary, the lawyer owes a duty of confidentiality to each client individually. As such, Wollinka shall not advise either client of independent changes in the other's estate plan or of any facts revealed by one client which may impact the decisions of the other. In sum, the undersigned hereby acknowledge the potential that a conflict of interest may arise and authorize Wollinka to act as attorney for each party in preparation of their estate plans, administering their estates upon death, and if applicable, acting as personal representative or trustee of their estates. Furthermore, Wollinka shall have no duty to advise either client of independent changes in the other's estate plan or of any facts revealed by one client which may impact the decisions of the other.

Furthermore, it was explained to me by Wollinka that a non-resident who is not related to me cannot serve as personal representative.

In certain circumstances Wollinka will provide a "free" consultation to prospective clients, however, please be advised that if the prospective client instructs Wollinka to proceed with the preparation of estate planning documents, there will be a minimum charge of \$250.00. The charge is not for the consultation, but rather dictation to the legal assistant as to the preparation of documents, opening the file by the legal assistant (both on the computer database, as well as a hard copy file), and miscellaneous other matters which must be accomplished by the firm once the attorney has been instructed to move forward with the preparation of the documents.

Husband Signature

Wife Signature

Date: _____

Date: _____