



CAROLINA TAX, TRUSTS & ESTATES

NEW CLIENT INTAKE FORM

Please fill out this form the best you can. We need to know this information in order to effectively assist you. As always, all the information you supply to us will be kept STRICTLY CONFIDENTIAL.

All our forms are in PDF “fillable” format; meaning, these documents can be filled out using an Adobe program so you may type your responses. Be sure to save the document first and then type in your responses. When you are done filling out the form, please save it and then email it to us in addition to any supplemental forms, or you can print it and mail it back to us.

If you would prefer, you may print out the forms and then write your responses if that is easier.

Should you have any questions, please call us at (910) 725-0498. We will be happy to help you.

HOW DID YOU HEAR ABOUT US?

(Please provide the name of the referral in the space provided.)

Referral from _____

Newspaper _____

Former Client _____

Other _____

*****Next page please - This section intentionally left blank*****

Today's Date: _____

CLIENT INFORMATION

Note: If there are two clients (e.g. spouse, partners, etc.) – please fill out information for each client. Any information that is the same – you may write “same” in that field. Thank you.

Client Name: _____

Date of Birth: _____ Soc. Sec. No.: _____

Home Phone: _____ Cell Phone: _____

Email Address: _____

Home Address: _____

City: _____ State: _____ Zip: _____

(if applicable)
Client Name: _____

Date of Birth: _____ Soc. Sec. No.: _____

Home Phone: _____ Cell Phone: _____

Email Address: _____

Home Address: _____

City: _____ State: _____ Zip: _____

REASON FOR YOUR ENGAGEMENT WITH US

Below, please check the reason for engaging with us. In addition to the information you have provided above, please fill out the additional supplemental intake form if we are providing estate planning or estate administration services.

Estate Planning. Please also fill out the ***Estate Planning Intake Form***. One form per person. (e.g. you and your partner/spouse should fill out your own form.)

Estate Administration/Probate. Please also fill out the ***Estate Administration Intake Form***.

Guardianship Matters.

Company/LLC Formation.

Other. (Please provide info)