Advanced Needs Analysis

LSPN PRO

Incapacity Planning

Incapacity Planning

Planning around the costs and risks of becoming incapacitated through legal documents and financial vehicles

Estate Planning

Estate Planning

Establishing guidelines for your assets and family in the case of a life crisis including death or long term absence

Business Planning

Business Planning

Properly structuring business interests from formation of transfer and administration of business operations and benefits

Asset Protection Planning

Asset Protection Planning

Protecting your property and personal interests from potential sources of liability including lawsuits and creditors

Tax Planning

Tax Planning

Minimizing your tax exposure for income taxes and transfer taxes using legitimate tax planning strategies

Legacy Planning

Legacy Planning

Establishing a legacy of assets and values through guidelines values statements and life stories.

INTERVIVOS
PLLC

ADVANCED ANALYSIS INTAKE WORKSHEET

PERSONAL INFORMATION

Legal Name ____
(name most often used to title property and accounts)

Prefer to be called ________________________Birth date ____________SS# ________________ US Citizen? Yes

Home Address__________________________________ City _____________ State________ Zip ___________

Home Telephone ________________ County of Residence ___________Business Telephone ________________

E-mail Address ______________________________ ❑ It is okay to communicate with me via my E-mail address.

Date of Marriage __________________________

Wife's Legal Name ____

Children's Ages ____

Do care for anyone who has special needs? ____

***If you would like Tax Analysis please include last 2 years tax returns.**

***If you would like Business Planning Analysis please include corporate documents.**

***If you would like a review of an existing Estate Plan please include estate plan documents.**

What other Advisors do you currently have?

☐ Personal Attorney
☐ Accountant
☐ Financial Advisor
☐ Life Insurance Agent

SITUATION SPECIFIC QUESTIONS

(Please check "Yes" or "No" for the answer) Yes No	Yes	No
Have you or your spouse ever been previously married? *Please Describe*: ______________________________	☐	☐
Are you Co-habitating or Do either of you have children with a non-spouse? *Please Describe*: ______________________________	☐	☐
If married have you and your spouse signed a pre- or post-marriage contract?	☐	☐
Are either you or your spouse a Non-Citizen of the U.S.? *If So, Please Describe*: ______________________________	☐	☐
Have you or your spouse previously completed will, trust, or estate plan documents?	☐	☐
If married, have you lived in a Community Property State while married to each other? *AZ, CA, ID, LA, NV, NM, TX, WA, or WI*	☐	☐
Are you (or your spouse) currently the beneficiary of anyone else's trust? *Please explain* ______________________________	☐	☐
Do any of your children have special educational, medical, or physical needs? ______________________________	☐	☐
Do any of your dependents or children receive governmental support or benefits?	☐	☐
Do you or your spouse hold any professional licenses or designations? *Please Describe*: ______________________________	☐	☐

ASSET SPECIFIC QUESTIONS

(Please check "Yes" or "No" for the answer) Yes No	Yes	No
Do you or your spouse own any Real Property besides your residence? *Please Describe*: ______________________________	☐	☐
Do you own any property outside of the U.S. or in Native American Tribal Lands? *Please Describe*: ______________________________	☐	☐
Is your combined Net Worth over $3,000,000? What is your combined net worth? $_______________	☐	☐
Do you or your spouse own or plan on owning a business? *Please Describe*: ______________________________	☐	☐
Do you plan on selling a a business interest or any real property in the near future? *Please Describe*: ______________________________	☐	☐
Do you or your spouse own any federally or state regulated firearms? *Please Describe*: ______________________________	☐	☐

Do you or your spouse own any patents, royalties, or any Intellectual Property? *Please Describe*: ____	☐	☐

PROVISION/ DESIGN SPECIFIC QUESTIONS

(Please check "Yes" or "No" for the answer) Yes No	Yes	No
Do you want to provide specific instructions in your plan related to a Spendthrift Beneficiary? *Please Describe*: ____	☐	☐
Do you want to plan around a future need to qualify for Medicaid or VA long term care benefits? *Please Describe*: ____	☐	☐
Do you want to provide any distributions in your plan to Multiple Generations of beneficiaries? *Please Describe*: ____	☐	☐
Do you plan to provide any distributions to charity in your plan or have a need for charitable planning? *Please Describe*: ____	☐	☐
Do you want to provide specific instructions in your plan related to Family Heirlooms or Collectibles? *Please Describe*: ____	☐	☐
Do you want to provide specific instructions in your plan related to Digital Assets? *Please Describe*: ____	☐	☐
Do you want to provide specific instructions in your plan related to providing for a Family Pet or Livestock? *Please Describe*: ____________________________________	☐	☐
Are you interested in leaving your life story/ personal legacy as part of your estate plan?	☐	☐

PROPERTY INFORMATION

	Husband/Client #1		Wife/Client #2		
Assets	# of Assets	Total Value	# of Assets	Total Value	How is Asset Titled?
Adjusted Gross Income (the amount of income you earn each year)					
Cash Accounts (i.e. checking, savings, CD, Money Market)					
Investment Accounts (i.e. brokerage accounts)					
Bonds (not held in an investment account)					
Stocks (not held in an investment account)					
Company Stock Options					

	Husband/Client #1		Wife/Client #2		
Assets	# of Assets	Total Value	# of Assets	Total Value	How is Asset Titled?
Retirement Plans (401k, IRAs, etc.)					
Pension Plans					
Life Insurance Policies (death benefit value)					
Life Insurance (cash value)					
Annuities					
Partnership & LLC Interests					
Corp. Business Interests (S-Corp or LLC)					
Sole Proprietorship Interests					
Oil, Gas, and Mineral Interests					
Monies Owed to You (promissory notes)					
Personal Residence					
Other Real Property					
Other Out-of-State Real Property					
Other Assets					
Anticipated Inheritance, Gift, or Judgment					
TOTAL ASSET VALUE					

Liabilities					
Real Estate Mortgages					
Total Liabilities ($$$)					
Net Estate ($$$) Total (Assets Minus Total Liabilities)					
Estimated Annual Income					
Estimated Annual Taxes					