EVANS & DAVIS

Pre Attorney Visit Memorandum

Please complete the memorandum to the best of your ability and return it to your attorney's team via email prior to the client meeting.

Reminder: Both spouses (or all business partners) should be in attendance at the intake meeting.

Marketing Representative Name: ______________________

Client Name: ______________________

Client Address: ______________________

Client Phone: ______________________

Client Email: ______________________

Scheduled Date & Time of Meeting: ______________________

Primary Attorney Scheduled for Meeting: ______________________

What is the need?

- ☐ Estate Planning (Planning for their family)
- ☐ Business Planning (Buy-Sell Agreement/Succession Planning)
- ☐ Other ______________________

Marketing Representative's Insurance Recommendations & Goals:

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Among the parties attending, who is the decision maker?

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Does the client have any past insurability issues? ☐ Yes ☐ No If yes, please expand:

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Has the client had any past negative experiences with Federated? ☐ Yes ☐ No If yes, please expand:

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Has the client had any past negative experiences with attorneys? ☐ Yes ☐ No If yes, please expand:

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Describe the Client's current estate plan:

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Please provide any additional information:

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