

CLIENT DATA CAPTURE FORM – ESTATE PLANNING & WEALTH MANAGEMENT

Thank you for arranging an initial consultation with K J Smith Solicitors.

Please complete the form below and hand this to the Lawyer you are seeing today. The information you provide will be uploaded to our electronic data base and used solely for the purpose of carrying out your instructions. You will **not** be sent marketing information and your data will **not** be sold to a third party. In due course you will be provided with our full Privacy Policy however if you wish to see this now, please speak to your Lawyer.

Your Name (first, middle)	(surname)
.....
Date of birth	
Your Address	
.....	
.....	
Post code	Is this property <input type="checkbox"/> owned, or <input type="checkbox"/> rented?
Your Contact Details	
Mobile	Work/Home
E-mail	

Your Name (first, middle)	(surname)
.....
Date of birth	
Your Address	
.....	
.....	
Post code	Is this property <input type="checkbox"/> owned, or <input type="checkbox"/> rented?
Your Contact Details	
Mobile	Work/Home
E-mail	

Where did you hear of us?

- branch drop-in bus CAB internet leaflet newspaper/magazine
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Signed: **Dated:**

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Thank you for taking the time to complete this form.

To be completed by K J Smith Solicitors:

Matter(s) to set up	<input type="checkbox"/> Dec of Trust	<input type="checkbox"/> Change Name	<input type="checkbox"/> LPA	<input type="checkbox"/> Swear
	<input type="checkbox"/> Deed of severance	<input type="checkbox"/> Certification	<input type="checkbox"/> Other:	
	<input type="checkbox"/> Will/s	<input type="checkbox"/> Probate:		
Assign to ALB	FEE EARNER			