



Wollinka & Wollinka
Attorneys at Law

ESTATE PLANNING PROFILE

Personal & Confidential (please complete pages 1 and 3)

I. PERSONAL INFORMATION

1. Date:	Referred by:	
2. Your name: <i>(as it should appear on legal documents)</i>	Birthday / Age:	SS#:
Spouse's name: <i>(as it should appear on legal documents)</i>	Birthday / Age:	SS#:
3. Home address (city, state, zip):	County:	Phone:
4. Business / or 2nd home (city, state, zip):	County:	Phone:
5. Date & place of marriage:		Date residence established in Florida:
6. Husband's Occupation:	Wife's Occupation:	
7. Husband's Citizenship:	Wife's Citizenship:	
8. Any Prior Marriages:	Details:	
9. Funeral Arrangements: Yes _____ No _____ Name of Funeral Home:	Prepaid: Yes _____ No _____ Location:	

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

Child's name: <i>(as it should appear on legal documents)</i>	Birth date:	Address:	Phone:

GRANDCHILDREN *(Complete only if you intend to make gifts or distributions to them)*

Child's name: <i>(as it should appear on legal documents)</i>	Birth date:	Address:	Phone:

Copy of Your Driver's License or identification: _____

Copy of Spouse's Driver's License or Identification: _____

PASCO OFFICE: *Trinity Professional Center, 1835 Health Care Drive, Trinity, FL 34655* **PHONE:** (727) 937-4177 **FAX:** (727) 934-3689
PINELLAS OFFICE: *3204 Alternate 19 N, Palm Harbor, FL 34683* **PHONE:** (727) 781-5444 **FAX:** (727) 781-7824



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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 \$100.00 must be paid prior to the preparation of any estate planning documents.

IV. ATTORNEY'S NOTES

Multiple horizontal lines for attorney's notes.



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VI. 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 _____ and _____, husband and wife, hereby acknowledge that DAVID J. WOLLINKA of WOLLINKA & WOLLINKA, Attorneys at Law, Chartered, (“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, despite some potential conflict, the undersigned hereby acknowledge the potential that 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.

Husband Signature _____

Wife Signature _____

Date: _____

Date: _____