|  |  |  |
| --- | --- | --- |
|  | **Client #1** | **Client #2** |
| **Full name:** |  |  |
| **Date of Birth:** |  |  |
| **Best contact number:** |  |  |
| **Email:** |  |  |
| **Home address:** |  |
| **Marital status:** | Single / De facto / Married / Separated / Divorced / Widowed |
| **Children of your union:** | Yes / No / NA |
| **Children from previous relationship:** | Yes / No |
| **Signature\* (Optional)** |  |  |
| **Date** |  |  |

\* *By signing this Estate Planning Authority Form, the client consents to the advisor providing personal information to Estate First Lawyers and Estate First Lawyers providing to the advisor information regarding the services provided to you pursuant to the relationship with the advisor.*

**Advisor Section:**

|  |
| --- |
| **Financial Advisor:** |
| **Meeting preference:** | [ ]  Face to face meeting: Brisbane / Sydney / Melbourne / Other^\_\_\_\_\_\_\_\_\_[ ]  Virtual meeting (Zoom or Teleconference) |
| **Estate Planning requirements:** | [ ]  Will potentially with TDT[ ]  Enduring power of attorney[ ]  Standard Will[ ]  Family trust[ ]  SMSF[ ]  Companies | [ ]  Will potentially with TDT[ ]  Enduring power of attorney[ ]  Standard Will[ ]  Family trust[ ]  SMSF[ ]  Companies |
| ^ Other locations include: Cairns, Townsville, Rockhampton, Mooloolaba, Toowoomba and Gold Coast |
| **Once this form is completed, please email to:** info@estatefirst.com.au |