



Questionnaire

Thank you for your interest in participating in the Estate Planning Clinic. The Estate Planning Clinic is a collaboration between Lakeshore Legal Aid and Thomas M. Cooley Law School. We are a teaching clinic staffed by law students. The students are authorized to practice law under the supervision of a licensed attorney. They can interview and counsel clients, draft wills, durable powers of attorney and powers of attorney for health care at **no charge** to the client.

Before we collect any confidential information from you, we must first determine if representation would create a potential conflict of interest with our legal clinic. If you are: 1.) An Oakland County resident; and 2.) Age 60 or older; and 3.) Have an estate valued at a maximum of \$150,000 if you are single or \$250,000 if you are married, (not including your primary residence); then please complete the following information and **return to us** by mail or fax for initial screening. All of this information is essential; therefore, it is important that you fill it out completely.

If you are not an Oakland County resident, please contact your local bar association for legal services in your county. If you are over the asset qualification, please contact the Oakland County Bar Association for their lawyer referral hotline: 248-338-2100.

Date: _____ Full Name: (Mr.)(Mrs.)(Ms.) _____

Date of Birth: _____ Last 4 digits of Social Sec.: _____

Phone: _____ Alt. Phone No.: _____

Address: _____

Are you married? (Y)(N)

Spouse's/Partner's name: _____

Date of Birth: _____