

Client Questionnaire — Henderson Estate Planning Intake

Matter: Estate of Henderson — Estate Planning and Trust Package | Sensitivity: INTERNAL | Allowed roles: partn

Client Information (Synthetic)

Client: Mary Henderson. Residence: Birmingham, AL. Family: Two adult children. Primary goals: avoid probate, create successor trustee plan, charitable bequest.

Asset Overview

Primary residence, retirement accounts, brokerage account, and a small LLC interest.

Preferences

Healthcare directive and durable power of attorney requested. Prefers simple distribution structure with optional charitable gift.