

WELCOME TO THE
LAW OFFICE OF JOHN L. ROBERTS

1200 Converse Street, Longmeadow, Massachusetts 01106



**TRUST & ESTATE PLANNING TEMPLATE
for a SINGLE PERSON**

This Template will help you organize important information and identify your best options.

Since the Template gathers so much information, you may not have everything available right now.

Fill in the information that you do have. To protect your privacy, log off your internet connection before you enter any data onto the form. After making an appointment, mail or bring your Template to our office.

Printing Options

Effective Communication with Your Attorney

Your Name : _____

Street Address: _____

City, State, Zip Code _____

Your Phone: _____ **Cell:** _____

Your Email: _____

People	Professional Planning Team	Property & Assets	Income & Resources	Your Plan and Legacy
People	<i>In this section, please list all of your children and / or the people who are most closely related to you.</i>			

