

ESTATE PLANNING TRACKING FORM

Name _____

Sem. Sponsor _____

Sem. Number _____

Address _____

Sem. Date. _____

Ref. Source _____

Case Ref _____

Cell Phone _____

Client Type _____

Home Phone _____

Appointment Date & Time _____

Bus. Phone _____

Attorney _____

Best Time to Call _____

___ CM: Changed mind/not interested

___ NA: No Answer

___ NN: No appointment needed

___ LMM: Left message

___ NI: Not interested now

___ LMM: Left message
with another person

Date/Time Called _____

Caller _____

Code & Remarks _____

RESULTS OF ATTORNEY CONFERENCE

WORD PROCESSING COMPLETED _____

___ (NS) No Show

___ (NWR) No Work Requested

___ (DOC REV) Wanted Existing Trust/Docs Reviewed

___ (CAN) Cancelled Appointment

___ (RES) Rescheduled for Date _____ Time _____

___ (AAN) Additional appointment needed Date _____ Time _____

___ (PW) Preparing Will

___ (PT) Preparing Trust

___ (PA) Preparing Amendment

___ (PD) Preparing DPA-Asset, DPA-HC, LW

___ (PO) Preparing Other _____

Charitable Gift: ___ YES ___ NO

Release Info: ___ YES ___ NO

Gift Totals

Contingent Rev \$ _____

Contingent Irrev \$ _____

Non-Contingent Rev \$ _____

Non-Contingent Rev.: \$ _____

Char. Gifts Entered _____

Execution Date _____

Date Document Signed _____

Date File Closed _____