

McHUGH AND MACRI

Attorneys at Law

DONALD M. McHUGH †
VINCENT MACRI †

RICHARD J. LUTZ, JR.
ADRIENNE J. BURKE

49 RIDGEDALE AVENUE
EAST HANOVER, NEW JERSEY 07936

(973) 887-4254
FAX (973) 887-6237
e-mail: mchugh.macri@optonline.net
mchugh.macri@verizon.net
www.mchughandmacri.com

† Certified Elder Law Attorney
by National Elder Law Foundation

**FEE FREE CONSULTATION
ESTATE/PRE/POST RETIREMENT PLANNING**

In anticipation of our phone conference for your "fee free consultation," this letter will assist you in compiling the information and documents necessary to allow us to analyze and provide concise advice on your retirement and estate planning.

Please complete the information, provide to us and keep a copy. Our office will call to schedule the consultation. Please provide your telephone number below.

1. Name of seminar group and date: _____
2. Your name, spouse & age, present health status: _____
3. Number and ages of children: name, phone/email of contact person: _____

4. Do you have a current Will, Power of Attorney, Health Care Directive? _____
5. Will your employment health insurance become your Medicare supplement upon retirement? _____
6. Will you receive a pension? _____ Monthly Amount _____
Have you selected a pension survivor option yet? Y _____ N _____
7. What is your fixed Social Security amount, if applicable? _____
8. If you own a home, original purchase price/current value/current mortgage balance: _____

9. In addition to the above home and retirement plans, what is the estimated value of all other assets, such as bank account, stocks, bonds, investments? _____
10. What is the face amount of any private life insurance policies? _____

Very truly yours,

McHUGH & MACRI, ESQS.