

Attorney Needs Assessment

Do you need help finding an estate planning attorney in Santa Clara County?

Please fill out a quick survey so we can help pair you with an attorney that best meets your needs. Send your completed form to the Foundation at info@cfoscc.org or mail it to 777 N. 1st Street, Suite 490, San Jose, CA 95112.

1 Please fill out your personal information so we can contact you.

Name(s): _____

Phone: _____ Email: _____

2 Where do you live? (Address, city or general area (e.g. "East San Jose) are acceptable.)

3 How far are you willing to travel to meet with an attorney?

_____ miles

4 How important is it that your attorney is Catholic/understands Catholic values?

- Very important
- Somewhat important
- Not important
- Prefer non-Catholic

5 Are there special circumstances in your plans that require an attorney with a specialty? E.g. a special needs child, elder law, a trust administered after death on behalf of a relative.

Unable to complete the questionnaire online or have additional questions?

Contact Nicholas Carney at 216.470.9162 or carney@cfoscc.org