

# Lassus Wherley

*Building Better Futures*



































































# Information on Completing the Form

## If you are completing the form online...

- ☞ This Questionnaire and Data Form (“form”) is a Portable Document Format (PDF) file. If you do not have a PDF reader, you can download this application for free at <http://get.adobe.com/reader/>.
- ☞ This form can be downloaded in PDF format from the Forms and Documents page of our website <http://www.lassuswherley.com/forms-and-documents>. You can also request a paper copy to be mailed to you through the Contact Us page of our website <http://www.lassuswherley.com/contact-us> or you can call us to request a copy.
- ☞ Make sure you save the form to a safe location on your computer where you can retrieve it later. After it is complete, the form will need to be printed to return it to us.
- ☞ Throughout the form, fill-in-the-blank spaces require you to type in answers in the space provided. If you need more space than what is provided, please use the “Additional Information” section. This section can also be used to provide information not requested in the form but that you feel is important for us to know.
- ☞ Where multiple choice check boxes and circles are provided to select the most appropriate answer, please choose one answer unless otherwise indicated.
- ☞ Click on a page number or section name in the Table of Contents to go to a desired area of the form. If you are not on the Table of Contents page you can click on the Table of Contents button found at the top of each page.
- ☞ There is a Bookmarks section on the left hand side of each page which is a menu of all the sections in the form. Clicking on a section name in Bookmarks will take you to a desired area.
- ☞ Click on the Highlight button found in the upper right hand corner of the form to identify areas that need to be completed.
- ☞ Click on the Instructions button at the top of each page to take you to this page.

When you have completed the form, please print and sign where indicated and follow the directions found on the last page to return the form and any other documentation requested to us.

If you need assistance, please call us at (908)-464-0102.

### **If you completing the form in hard copy....**

- ☞ This form can be downloaded in PDF format from the Forms and Documents page of our website: <http://www.lassuswherley.com/forms-and-documents> You can also request a paper copy to be mailed to you by calling us, or through the Contact Us page on our website: <http://www.lassuswherley.com/contact-us>
- ☞ Use a blue or black pen.
- ☞ Throughout the form, fill-in-the-blank spaces require you to write in answers in the space provided. If you need more space than what is provided, please use the “Additional Information” section found towards the end of the form. This section can also be used to provide information not requested in the form but that you feel is important for us to know.
- ☞ Where multiple choice check boxes and circles are provided to select the most appropriate answer, please choose one answer unless otherwise indicated.
- ☞ To complete the form online, please go to the Forms and Documents page of our website: <http://www.lassuswherley.com/forms-and-documents>

When you have completed the form, please print and sign where indicated and follow the directions found on the last page to return the form and any other documentation requested to us.

If you need assistance, please call us at (908)-464-0102.



## Information on Returning the Form

When you have completed the form, sign it, and return it to us. There are three ways to return the completed form to us and schedule an Initial Consultation:

- ☛ Mail the completed form along with other documentation requested. After we receive your form, we will contact you to schedule an Initial Consultation.
- ☛ Call us or go to <http://www.lassuswherley.com/contact-us> on our website and complete the information requested, making sure to check the box “Schedule an Initial Consultation.” Bring the completed form and other requested documentation to the consultation meeting.
- ☛ Hand deliver the completed form and other documentation requested, to our office, and we will schedule an Initial Consultation for you.

PLEASE DO NOT EMAIL THE FORM BACK TO US AS IT CONTAINS PERSONAL AND CONFIDENTIAL INFORMATION. EMAIL IS NOT A SECURE MEANS OF TRANSMITTING SENSITIVE INFORMATION, NOR IS ELECTRONIC FAXING.

### **Our contact information and office locations are:**

1 Academy Street  
New Providence, NJ 07974  
Phone: (908) 464-0102  
Fax: (908) 464-9852

3333 Renaissance Blvd., Ste. 207  
Bonita Springs, FL 34134  
Phone: (239) 495-1520  
Fax: (908) 464-9852

website: [www.lassuswherley.com](http://www.lassuswherley.com)

Email: [lwa@lassuswherley.com](mailto:lwa@lassuswherley.com)