

L A W O F F I C E S O F
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PROBATE QUESTIONNAIRE

This is a general questionnaire and checklist setting forth information and steps that are typically needed to administer an estate in probate court. Some of these items may not pertain to your situation. Please provide copies of any documents requested, and answer any questions below as best you can in the space provided or in an attachment.

Your Information:

Name: _____

Address: _____

Telephone: _____

E-mail: _____

Relationship to Decedent: _____

Who referred you to us: _____

Decedent's Information:

Name: _____

Address at Death: _____

Date of Death: _____ Place of Death: _____

Social Security # _____

Will Information:

Did Decedent have a will? (Circle) YES NO **-attach copy if yes**

If so, was there a codicil? (Circle) YES NO

Executor's Names / Address: 1. _____

2. _____

Decedent's Surviving Relatives:

Spouse: Name: _____
Address: _____

If no Spouse: (Circle One) Divorced Never Married Spouse Deceased

Natural Children: Name: _____
Address: _____

Name: _____
Address: _____

Name: _____
Address: _____

Adopted Children: Name: _____
Address: _____

Step Children: Name: _____
Address: _____

Pre-Deceased Children: (Circle One) YES NO

Name: _____

Decedent's Assets:

Real Estate Property - Residence

Address _____

Other Real Property

Address _____

Bank Accounts - **attach copies as date of death**

Name of Bank _____

Checking account # _____

Amount _____

Savings account # _____

Amount _____

CD _____

Money Market _____

Stocks – **attach copies of all statements as to date of death**

Business Interests: _____

Partnership: _____

Notes Receivable: _____

Insurance Policies: _____

Annuities: _____

Boats/Trailer: _____

Vehicles: - **attached copies of Kelly blue book private party value**

Year _____

Make _____

Model _____

Mileage at date of death _____

Condition at date of death _____

Vehicle:

Year _____

Make _____

Model _____

Mileage at date of death _____

Condition at date of death _____

Household possessions value _____

Any items of significant value (jewelry, antiques, etc.)? _____

Decedents Debts:

Mortgage: _____

Income Taxes: _____

Loans/Credit Cards: _____

Any pending lawsuits? Potential Lawsuits? _____

Other Debts: _____
