

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

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

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

Executor's Name / Address: _____

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/Step Children:
Name: _____
Address: _____

Step Children: Name: _____
Address: _____

Pre-Deceased Children: (Circle One) YES NO
Name: _____

(If pre-deceased child left issue (children or grandchildren) provide names also)

Decedent's Assets:

Real Estate Property – Residence – **attach copy of grant deed if available**

Address _____

Fair Market Value as of Date of Death: _____

Other Real Property – **attach copy of grant deed if available**

Address _____

Fair Market Value as of Date of Death: _____

Bank Accounts - **attach bank statement as of date of death**

Name of Bank _____

Checking account # _____

Date of Death Value: _____

Savings account # _____

Date of Death Value: _____

CD/Money Market _____

Stocks/brokerage accounts – **attach complete statement as of date of death** _____

Business Interests/Partnerships: _____

Notes Receivable: _____

Life Insurance Policies (list beneficiary): _____

Annuities (list beneficiary): _____

Boats/Trailers: _____

Vehicles – provide a copy of pink slip if available:

Year _____

Make _____

Model/VIN _____

Mileage/Condition as of date of death _____

Vehicle - provide a copy of pink slip if available:

Year _____

Make _____

Model/VIN _____

Mileage/Condition as of death _____

Household possessions- estimated garage sale value as of date of death: _____

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

Decedents Debts: - provide statements/notices as of date of death

Mortgage: _____

Outstanding Income Taxes: _____

Other Loans/Credit Cards: _____