

PROBATE OF ESTATE INTAKE QUESTIONAIRRE

Today's Date: _____

Your Name: _____

Your date of Birth: _____

Your Social Security Number: _____

Your Address: _____

Your City/State/Zip: _____

Your email: _____

Your Contact numbers (Home work cell)

Your Relationship to Decedent: _____

NAME OF DECEDENT: _____

Date of Birth: _____ Location of Birth: _____

Date of Death: _____

Address and Location at Death: _____

Age AT TIME OF DEATH: _____

ADDRESS OF DECEDENT: _____

COUNTY: _____

Decedent's City/State/Zip Code: _____

AGE _____ DOB: _____

DECEDENT'S SOCIAL SECURITY # _____

TAX I.D.# _____

LENGTH OF LAST ILLNESS: _____

PLACE OF DEATH: _____

TREATING PHYSICIAN: _____

PHONE # : _____

ADDRESS: _____

LAST ILLNESS: _____

DEBTS: _____

FUNERAL EXPENSES: _____

Did the decedent leave a will? Yes No Unknown

If yes, do you have a copy of the will? Yes No

Are you named as the executor or administrator in the will? Yes No

If no, who is named? _____

Are you named as a beneficiary in the will? Yes No

What was the marital status of the decedent? _____

If married or separated, please provide the name and address of the spouse:

Did the decedent have any children? Yes No Unknown

If yes, list their names and addresses. If no, please list the names and addresses of the decedents closest known relatives:

Is there anyone not listed above (including charitable organizations) who is named as a beneficiary of the will, if any? Yes No Unknown

If yes, list their names and addresses:

Please describe any concerns you have about this estate:

Describe what you would like to happen to resolve your concerns (your preferred outcome):

Have other attorneys worked on this matter? Yes No

If yes, provide names, addresses, and a brief description of their involvement:

SUMMARY OF ESTATE PROPERTY:

Please list all Real Estate Owned (as well as an estimate of value for such) by the Decedent at the time of his death:

Do you intend to sell the real estate or have it distributed out to one or more of the heirs? _____

Has a purchaser been found for this real estate? _____ If so, Purchaser's names & address: _____

Sale Price: \$ _____

Has a contract for the sale of the real estate been signed? _____

Please list all Personal Property Owned (as well as an estimate of value for such) by the Decedent at the time of his death: _____

Please list all Sources of income (and the specific amounts of each) of the Decedent at the time of his death (ex: Social Security, Employer Pension, Life Insurance Annuity, etc.): _____

Did the Decedent own any life insurance policies? If yes, please list the following:

Name of insurance Company: _____

Policy No. _____

Beneficiaries:

Please list all Bank accounts owned by Decedent at the time of his/her death:

BANK: _____

TYPE OF ACCOUNT: _____

ADDRESS: _____

PHONE # _____

ACCOUNT # _____

BALANCE \$ _____

BANK: _____

TYPE OF ACCOUNT: _____

ADDRESS: _____

PHONE # _____

ACCOUNT # _____

BALANCE \$ _____

Please list all Stocks owned by Decedent at the time of his/her death:

Please list all Automobiles and Equipment owned by Decedent at the time of his/her death (please include VIN numbers, if applicable):

HEIR, DEVISEE & LEGATEE INFORMATION

NAME: _____

AGE: _____

RELATION: _____

DATE OF BIRTH: _____

ADDRESS: _____

SOC SEC # _____

NAME: _____

AGE : _____

RELATION: _____

DATE OF BIRTH: _____

ADDRESS: _____

SOC SEC #: _____

NAME: _____

AGE: _____

RELATION: _____

DATE OF BIRTH: _____

ADDRESS: _____

SOC SEC # : _____

NAME _____ AGE

RELATION _____ Date of Birth:

ADDRESS _____ SOC SEC #

NAME _____ AGE

RELATION _____ Date of Birth:

ADDRESS _____ SOC SEC #

NAME _____ AGE

RELATION _____ Date of Birth:

ADDRESS _____ SOC SEC #

SPECIAL INSTRUCTIONS OR NOTES:

Before the estate can be closed it will be necessary to file with the Court a Final Account which must balance to the penny. Although all checks will have to be signed by the personal representative, in some instances, the personal representatives prefer to have the attorney's office handle the bookkeeping and actually prepare all checks, balance the checkbook monthly, etc. (See letter to prospective personal representative.)

Estate checks & ledger will be kept by: Representative _____ Atty _____