



Law Offices of

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To prepare for your Probate Consultation, please fill out this form to the best of your ability. If you do not know the answer, skip it and fill out the rest of the form with as much information as you have, or are comfortable with giving at this time.

PART 1: Please answer the following questions about the **decedent**:

1) All Names used by Decedent:

2) Date of Death:

3) Place of Death:

4) Residence of Decedent:

5) Social Security Number:

6) Date of Birth:

7) Marital Status:
(Choose One)

- Married Divorced Never Married

Name of Spouse

Date of Death of Spouse,
If Applicable

Additional Comments,
If Applicable

8) Approximate value and assets in estate in which there is no named beneficiary on the account:

Real Property

Cash

Stocks

Car(s)

Other / Misc.

Please Note: No attorney-client relationship is established by the use of this form. Nothing on this page should be used as legal advice.

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9) Annual Estate Income: (do not include Social Security or pension income which is no longer relevant)

Rental Income _____
Interest Income _____
Other Income _____
Other Income _____

10) Approximate Value of Decedent's Debts:

Mortgage \$ _____
Credit Cards \$ _____
Medical Bills \$ _____

PART 2: Please answer the following questions about the **Person to be Appointed to Administer the Estate:**

1) Name _____
2) Address _____

3) Date of Birth _____
3) Driver's License _____
4) E-mail _____
5) Fax Number _____
6) Phone Number
Home: _____ Primary
Work: _____ Primary
Cell: _____ Primary



7) Do you have credit problems? Yes No
(Choose One)

8) Signature

Do you use your middle initial in
your signature?

Write out how you sign your
name:

Part 3: Please provide documentation for the following assets in probate.

1) Copy of will and codicils, if any.

If will is not self-proving, are the witnesses still living at the address listed in the will?

2) Copy of death certificate, if available.

3) Copy of deed, property tax bill, if available.

4) Copy of bank accounts and stocks, if available.

5) Copy of revocable living trust, if applicable. Names and addresses of all persons named in the trust.

Part 4: Contact Information Needed

A) If there **IS A WILL**, either below or on a separate sheet of paper, please provide the names and address of **ALL** persons named in the will including alternate executors.



B) If there **IS NO WILL**, either below or on a separate sheet of paper, give the names of addresses of the heirs, usually the spouse and/or children. If there is/are a predeceased child or children, please give the name and date of death of that child or children and the cause of death of the predeceased child or predeceased children.

If any minors are listed above, please provide their date of birth.

*****THE FOLLOWING ONLY APPLIES IF THERE IS NEITHER A SPOUSE NOR***
CHILDREN. IF IT DOES NOT APPLY, SKIP.**

Only if there are neither a spouse nor children involved, provide names and addresses of decedent's parents. If any are deceased, indicate date and year.

Only if there neither a spouse nor children are involved, and parents are deceased, provide names and addresses of decedent's siblings. If any are deceased, give the names and addresses of the children of the deceased sibling. PLEASE NOTE THAT WE NEED MATERNAL AND PATERNAL RELATIVES.
