

# Death & Probate

*Preparing for initial meeting with Probate Lawyer*

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*It is advisable you seek the counsel of an experienced Probate Lawyer to help you navigate through the process of Probate Court. If you are responsible of a family member who died without a Will or have been named "Executor," "Personal Representative" or "Appointed Administrator" it is important you provide all information of the deceased to your Attorney.*

### **Names and Addresses**

Full Legal Name: \_\_\_\_\_ Nickname: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
County: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
Cell Phone: \_\_\_\_\_ E-mail Address: \_\_\_\_\_

Relationship to the Deceased: \_\_\_\_\_

### **Information of the Deceased**

*All information being provided in this form is intended to be kept confidential*

Name of Deceased: \_\_\_\_\_

Deceased's Date of Birth: \_\_\_\_\_

Deceased's Date of Death: \_\_\_\_\_

In what town/city was the deceased born: \_\_\_\_\_

Social Security of Deceased: \_\_\_\_\_

***Death Certificate: Please provide original copy***

#### **❖ Questions:**

Did the deceased have an existing Will(s)?  Yes  No  
If answered yes, please provide the Attorney the original

Did the deceased have an existing Trust(s)?  Yes  No  
If answered yes, please provide the Attorney with copies of all accounts

**❖ Background Knowledge of the Deceased**

Was the deceased married?  Yes  No

If yes, what is/was the spouse's name? \_\_\_\_\_

Is the deceased's spouse still living?  Yes  No

If no, when, and where did the spouse die? \_\_\_\_\_

Did the deceased have any children?  Yes  No

If yes, please name below:

Name	Date of Birth	Adopted or Previous Marriage	Children Surviving

Have any of the children listed above, **receive an advance on their inheritance or financially indebted to the deceased?**  Yes  No

If yes, please explain:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Are any children deceased?**  Yes  No

If yes, please list the children:

Name	Date of Birth	Date of Death	Children Surviving

Deceased's Grandchildren, if any:

Name	Date of Birth	Parents

Other pertinent family information:

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**Personal Representative:**

If applicable, Did the deceased's will or any line of communication indicate who should be Personal Representative ("Executor") of their estate? A Personal Representative is responsible for probating the will, paying debts, collecting assets, and selling the estate.  Yes  No

If yes, who? \_\_\_\_\_

**Safe Deposit Box:**

Did the deceased have a safe deposit box?  Yes  No

If yes, where is it located? \_\_\_\_\_

Does anyone else have access?  Yes  No

If yes, who has access? \_\_\_\_\_

## Professionals:

Did the deceased have an Attorney?  Yes  No

If yes, please provide the information on the Attorney:

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Did the deceased have an accountant?  Yes  No

If yes, who was their accountant?

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Did the deceased have a financial planner, investment advisor or insurance agent?

Yes  No

If yes, please provide the information:

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## Deceased's Assets

❖ Estimated net worth of estate: \$\_\_\_\_\_

Did the deceased have any funding accounts?  Yes  No

If yes, please be sure to provide copies of all accounts

### ***CHECK ALL THAT APPLY***

#### ❖ **Accounts held at financial institutions:**

Checking's and savings, or certificates of deposit, with banks, saving and loans, or credit unions.

How many different financial institutions? \_\_\_\_\_

#### ❖ **Investments** (check all that apply)

Cash or money fund accounts with stock broker firms. How many different broker firms? \_\_\_\_\_

Stocks, bonds, and mutual funds where broker holds the certificate and sends statements showing the balance? How many different stock brokerage firms?  
\_\_\_\_\_

Mutual funds where deceased dealt directly with the issuing company rather than through stock broker. How many mutual fund companies? \_\_\_\_\_

Stocks and bonds (other than the U.S Savings Bonds) where the deceased held certificates in their possession

U.S. Savings Bonds

Treasury bills or other government securities

Limited partnerships. How many? \_\_\_\_\_

Oil and gas mineral rights in land. How many parcels of land? \_\_\_\_\_

Other securities (describe)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.

#### ❖ Retirement Plans:

Individual retirement accounts (IRAs), Keogh, or other individual plans providing tax deferral for deposits and income. How many institutions hold IRA accounts?  
\_\_\_\_\_

Employer-provided profit sharing or benefit plans?  
How many plans are there? \_\_\_\_\_

#### Real Estate, please complete below:

Personal residence located in the State of \_\_\_\_\_

Other property other than deceased's residence, how many parcels do he/she own?  
\_\_\_\_\_

If so, in what state(s) are they located in? \_\_\_\_\_

Did the deceased purchase any of the above properties on a contract for a deed?

Yes  No

If yes, provide details:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.

#### Complete this section if the deceased engaged in business *ONLY*

Do the deceased own a business, or was a partner in a business?  Yes  No

If yes, complete the following below:

Business organized as a corporation. How many corporations? \_\_\_\_\_

How many corporations are subchapter S? \_\_\_\_\_

Business is organized as a partnership. How many? \_\_\_\_\_

Business is a sole proprietorship. How many different firms? \_\_\_\_\_

❖ **Receivables:** If any money is owed to the deceased, as payments on contracts, where the deceased sold a business, payments on obligations secured by real estate, or where he/she loaned money to someone and held a note.

Indicate each type of indebtedness:

Promissory note(s) secured by real estate. Amount(s) owed: \_\_\_\_\_

Installment contract(s) of sale of personal property. Amount(s) owed: \_\_\_\_\_

Unsecured promissory note(s). Amount(s) owed: \_\_\_\_\_

### Life Insurance Policies:

Company Name:	Face Amount	Type of Policy

### Annuities:

Please indicate the name of the annuitant and the type of annuity. Do not list annuities under which no benefits are payable after death. Regular annuities payable for guaranteed minimum term or amount:

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Tax-deferred annuities:

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❖ Personal property other than automobiles, trucks, boats, and trailers:

- Household furniture and appliances
- Collections, arts, antiques, valuable jewelry
- Automobiles
- Boats
- Recreational vehicles
- Motor home
- Business machinery and equipment
- Personal equipment and tools
- Farm or ranch machinery/equipment (other than general tools)
- Livestock

**Liabilities:**

*If you are aware of any liabilities or debts of the deceased, please note below for the attorney:*

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**Questions:**

*If you have any questions or concerns, please note below:*

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