

PROBATE INTAKE

QUESTIONS FOR CLIENT

Client/Petitioner _____

Address _____

Phone _____ SSN _____

Minor? _____ Felony convictions? _____

U.S. resident *If petitioner is not US resident, must designate US resident administrator:*

Who can nominate?

Designate's Name _____

Relationship to Decedent _____ DOB _____

SSN _____ Tel _____

Address _____

Minor? _____ Felony convictions? _____

DECEDENT'S INFORMATION

Decedent _____

Relationship to Petitioner _____ SSN _____

Residence at death _____

DOD _____ (obtain death cert)

DOB _____

If Will: Date _____ (obtain original) Codicil, if any _____

Executor named in Will _____ Address _____

_____ Bond required? _____ Page _____

Lifetime gifts count? _____ Any lifetime gifts made? _____

If No Will: Preference of administrators:

1. SS or his/her nominee _____

2. Legatees or their nominee, preference to children _____

3. Children or their nominee _____

4. Grandchildren or their nominee _____

5. Parents or their nominee _____

6. Siblings or their nominee _____

7. Nearest kin or their nominee _____

ASSETS

1. Real Estate

2. Banks

3. Vehicles

4. Pensions/Annuities _____

5. Stocks/Bonds/Mutual Funds/CDs _____

6. Life Insurance _____

7. Business Interests _____

8. Online (website/blog/ad revenue/etc.) _____

9. Patents _____

HEIRS AND BENEFICIARIES

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

OTHER QUESTIONS

Did decedent file bankruptcy? _____ Details: _____

If decedent involved in any pending court proceeding, describe: _____

Are there potential contestants or claimants? Describe: _____

Name of accountant _____

Safety deposit box: y/n _____ Bank? _____ Access? _____

Compensation for Estate Representative? _____