



PROBATE INTAKE – Client Firm

QUESTIONS FOR CLIENT

Client \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_  
Contact Person \_\_\_\_\_  
Email \_\_\_\_\_  
Name of person filling out this form: \_\_\_\_\_

QUESTIONS FOR PETITIONER

Name \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_ SSN \_\_\_\_\_  
Relationship to Decedent \_\_\_\_\_ DOB \_\_\_\_\_

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

PROPOSED ADMINISTRATOR

Designate's Name \_\_\_\_\_  
Relationship to Decedent \_\_\_\_\_ DOB \_\_\_\_\_  
SSN \_\_\_\_\_ Tel \_\_\_\_\_  
Address \_\_\_\_\_  
Felony convictions? \_\_\_\_\_  
Occupation \_\_\_\_\_

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

VALUE

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

\_\_\_\_\_

TOTAL ASSET VALUE FOR PETITION: \_\_\_\_\_

HEIRS AND BENEFICIARIES

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_

OTHER QUESTIONS

Did decedent file bankruptcy? \_\_\_\_\_ Details: \_\_\_\_\_

If decedent involved in any pending court proceeding, list relevant information incl. court, case no., date filed, atty of record, status:

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Are there potential contestants or claimants for this estate? Describe:

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Name of accountant \_\_\_\_\_

Safety deposit box: y/n \_\_\_\_\_ Bank? \_\_\_\_\_ Access? \_\_\_\_\_

Compensation for Estate Representative? \_\_\_\_\_

OTHER INFORMATION: