



Questionnaire to Probate Estate

How did you hear about us?	
I. DECEDENT INFORMATION	
Full name (including middle)	
Maiden	
Social Security number	
Date of Birth	
Date of Death	
Date of Will	
Address at the time of death	
County of Residence at the time of death	
II. DECEDENT'S SPOUSE INFORMATION (LIVING OR DECEASED)	
Full Name	
Age	
Date of Birth	
Date of Death	
Phone	
Address	
City, State, Zip	
III. DECEDENT'S EXECUTOR/PERSONAL REPRESENTATIVE INFORMATION	
Full Name	
Address	
Social Security Number:	Date of Birth:
Email:	Phone:

IV. DECEDENT'S LIVING CHILDREN INFORMATION

Name: _____
Relationship: _____
Address: _____
Mobile Phone: _____
Date of Birth: _____ Age: _____
Email: _____

Name: _____
Relationship: _____
Address: _____
Mobile Phone: _____
Date of Birth: _____ Age: _____
Email: _____

Name: _____
Relationship: _____
Address: _____
Mobile Phone: _____
Date of Birth: _____ Age: _____
Email: _____

Name: _____
Relationship: _____
Address: _____
Mobile Phone: _____
Date of Birth: _____ Age: _____
Email: _____

Name: _____
Relationship: _____
Address: _____
Mobile Phone: _____
Date of Birth: _____ Age: _____
Email: _____

IV. DECEDENT'S DECEASED CHILDREN INFORMATION

Name: _____
 Relationship: _____
 Date of Death: _____ Any Children? Yes No
 Surviving Children's Names, Addresses and Dates of Birth:
 1)
 2)
 3)

Name: _____
 Relationship: _____
 Date of Death: _____ Any Children? Yes No
 Surviving Children's Names, Addresses and Dates of Birth:
 1)
 2)
 3)

V. ASSETS

Please list the value of the following assets owned by the deceased, the deceased's spouse, or jointly. It is not necessary to provide the exact value of each asset; an approximation or average balance is sufficient. If you have any questions about the information requested below, please feel free to make a note and I will discuss it with you in detail when we meet.

	Deceased	Deceased's Spouse	JOINT
Cash			
Checking Accounts			
Savings Accounts			
CD's			
Money Market Funds			
Stocks and Stock Funds			
Taxable Bonds / Bond Funds			
Retirement Funds			
401K Plans			
IRA's			
Keoghs			
Annuities			

Copyrights, Royalties, Patents, Trademarks, and other Tangible Rights			
Life Insurance			
Long Term Care Insurance			
Motor Vehicles			
Boats			
Aircrafts			
Sports and Hobby Equipment			
Household Possessions (Antique, artwork, jewelry, collections, etc.)			
Interests in Trusts			
Family Business			
Other Business Interests			
Property subject to a power of appointment			
Other			
VI. REAL ESTATE			
	Address		Titled?
Primary Residence			
Secondary Residence			
Other			
VII. LIABILITIES			
Real Estate Mortgage			
Auto Loans			
Business Loans			
Educational Loans			
Other Long Term Debt			
Personal Loans			
Other Short-term debt			

Questions for Attorney: