

PROBATE QUESTIONNAIRE

NAME OF DECEDENT:

Address at time of death:

[If they have a death certificate, there is no need to get the following information.]

DOB:

Place of birth:

DOD:

Place of death:

SS#:

Spouse:

DOB:

SS#:

[Please get DOB & SS# even if spouse is pre-deceased.]

HEIRS/INTERESTED PARTIES:

Name & Address

Relationship

DOB [minor's only]

PROPOSED PERSONAL REPRESENTATIVE:

PHONE:

ADDRESS:

FINANCIAL INFORMATION

PROBATE ASSETS:

Homestead \$ _____
(approximate)

Address:

Legal Description:

Other Real Estate \$ _____
(approximate)

Address:

Legal Description:

Cash (copies of bank statements at time of death)

Bank:

Account/CD No.:

Balance/Date of Death:

Stocks, Bonds, Securities & Investments

Other (vehicles, boats, etc. & approximate value)

NON-PROBATE ASSETS:

Joint Tenancy Real Estate \$ _____

Address:

Legal Description:

Joint Tenancy Bank Accounts

Bank: Account/CD No.: Balance/Date of Death:

Life Insurance

Company: Amount: Beneficiaries:

Other \$ _____

APPROXIMATE INDEBTEDNESS (notes, loans, credit cards, etc.)

\$ _____ TOTAL DEBT