

NEW PROBATE CLIENT INFORMATION

1. NAME OF DECEDENT

2. ADDRESS OF DECEDENT:

3. DATE AND PLACE OF DEATH

4. DID DECEDENT HAVE A WILL? IF SO, PLEASE PROVIDE ORIGINAL, UNLESS IT HAS BEEN FILED IN COURTHOUSE AND THEN PROVIDE COPY.

5. NAME AND ADDRESS OF PERSON TO BE EXECUTOR OR ADMINISTRATOR OF THE ESTATE. DATE OF BIRTH OF PERSON NAMED TO BE ADMINISTRATOR OR EXECUTOR.

6. THEIR PHONE NUMBERS:

HOME:

WORK:

CELL:

EMAIL ADDRESS:

7. HAVE YOU EVER SERVED AS AN ADMINISTOR OR EXECUTOR BEFORE? IF SO, WHEN, WHERE, AND WHAT IS CASE NUMBER?

8. LIST THE BANKS WHERE THE DECEDENT HAS MONEY TO YOUR KNOWLEDGE AND THE NATURE OF THE ACCOUNTS AND WHOSE NAMES IS ON EACH ACCOUNT.

9. LIST THE NAMES, ADDRESSES, AND ALL PHONE NUMBERS (CELL, HOME, & WORK) OF ALL HEIRS, OR, IN THE CASE OF A WILL, NAMES, ETC. OF HEIRS, LEGATEES, AND DEVISEES. LIST THE NUMBER OF MARRIAGES OF THE DECEDENT AND THE CHILDREN THAT CAME FROM EACH SO WE CAN SHOW HEIRSHIP.

10. WHERE DID DECEDENT WORK WHEN THEY DIED AND WHERE ELSE HAD THEY WORKED? WHAT DID THEY MAKE? WAS THERE A PENSION PLAN?

11. ARE YOU AWARE OF ANY LIFE INSURANCE POLICIES? IF SO, PLEASE PROVIDE ALL INFORMATION REGARDING THE SAME.

12. ARE YOU AWARE OF ANY OTHER INVESTMENTS? IF SO, PLEASE PROVIDE COPIES OF ALL INFORMATION RELATING TO THE SAME.

13. LIST ASSETS OF THE DECEDENT AND ESTIMATE OF VALUE OF EACH ITEM:

REAL PROPERTY----BRING COPIES OF THE LEGAL DESCRIPTIONS TO APPOINTMENT WITH YOU

PERSONAL PROPERTY

a. FURNITURE---DON'T HAVE TO LIST EACH ITEM

SPECIFICALLY, JUST LIST ROOM OF DINING ROOM FURNITURE, ETC. UNLESS THE ITEMS ARE OF PARTICULAR VALUE---MORE THAT A NORMAL DINING ROOM SET.

b. BANK ACCOUNT

c. NOTES PAYABLE TO THE DECEDENT

d. OTHER STUFF

e. VEHICLES:--BRING COPIES OF TITLES, IF YOU HAVE.

14. LIST DEBTS OF THE DECEDENT:

MORTGAGES:--BRING COPIES TO APPOINTMENT

LOANS ON PERSONALTY:--BRING COPIES

LOANS ON VEHICLES:--BRING COPIES

CREDIT CARDS:--BRING COPIES

MEDICAL BILLS:---BRING COPIES

OTHER DEBTS:--BRING COPIES

15. GET COPY OF LAST TWO TAX RETURNS