

CONFIDENTIAL

PROBATE CLIENT QUESTIONNAIRE

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Please fill out and return this form with as much information as you have readily available. You may supplement it later.

Date	
Referred By	

CLIENT	
Name (Driver License)	
Nicknames	
Email - Personal	
Email - Work	
Phone - Cell	
Phone - Home	
Phone - Work	
Phone - Fax	
Address - Home	
Address - Work	
Relation to Decedent	<input type="checkbox"/> Family <input type="checkbox"/> Beneficiary <input type="checkbox"/> Personal Representative or Trustee <input type="checkbox"/> Creditor

CONTINUATION OF PROBATE CLIENT QUESTIONNAIRE

DECEDENT	
Name	
Date of Death	
Age	
Residence Address	
Relation to Client	

DECEDENT'S FAMILY		
	Name and Address	Age Under 18?
Surviving Spouse		
Children		
Parents		
Brothers & Sisters		
Other		

CONTINUATION OF PROBATE CLIENT QUESTIONNAIRE

DECEDENT'S ASSETS		
	Description	\$ Value
Homestead		
Other Real Estate		
Bank Accounts		
IRA and Retirement Accounts		
Investment Accounts		
Businesses		
Life Insurance		
Vehicles		
Jewelry, Furniture, Etc.		
Other		

CONTINUATION OF PROBATE CLIENT QUESTIONNAIRE

DECEDENT'S CREDITORS		
	Name and Address	\$ Amount
Mortgages		
Vehicles		
Banks		
Medical		
Other		

DECEDENT'S ADVISORS	
	Name and Address
Accountants	
Brokers	
Insurance Agents	
Other	

CONTINUATION OF PROBATE CLIENT QUESTIONNAIRE

PROBATE COURT	
County	
Date Filed	
Case Number	
Personal Representative	
Attorneys	
Other	

TRUST	
County	
Trustees	
Attorneys	
Other	

CONTINUATION OF PROBATE CLIENT QUESTIONNAIRE

Documents	Copy Attached?	Dates	Who Has Original
Death Certificate			
Wills			
Codicils			
Separate Writings (Tangible Property)			
Probate Petitions, Notices, Motions, Inventory, and Accountings			
Trust Agreements, Amendments, Restatements, Notices, and Accountings			
Divorce, Marital Prenuptial, Postnuptial			
Life Insurance Statements & Beneficiaries			
IRA and Retirement Account Statements & Beneficiaries			
Bank, Investment, and Financial Account Statements			
Real Estate Tax Bills, Deeds, Title Insurance, Surveys			
Other Documents			