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## 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.

<b>Date</b>	
<b>Referred By</b>	

<b>CLIENT</b>	
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

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CONTINUATION OF PROBATE CLIENT QUESTIONNAIRE

<b>DECEDENT</b>	
Name	
Date of Death	
Age	
Residence Address	
Relation to Client	

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

CONTINUATION OF PROBATE CLIENT QUESTIONNAIRE

<b>DECEDENT'S ASSETS</b>		
	<b>Description</b>	<b>\$ Value</b>
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

<b>DECEDENT'S CREDITORS</b>		
	<b>Name and Address</b>	<b>\$ Amount</b>
Mortgages		
Vehicles		
Banks		
Medical		
Other		

<b>DECEDENT'S ADVISORS</b>	
	<b>Name and Address</b>
Accountants	
Brokers	
Insurance Agents	
Other	

CONTINUATION OF PROBATE CLIENT QUESTIONNAIRE

<b>PROBATE COURT</b>	
County	
Date Filed	
Case Number	
Personal Representative	
Attorneys	
Other	

<b>TRUST</b>	
County	
Trustees	
Attorneys	
Other	

CONTINUATION OF PROBATE CLIENT QUESTIONNAIRE

<b>Documents</b>	<b>Copy Attached?</b>	<b>Dates</b>	<b>Who Has Original</b>
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			