

## CONFIDENTIAL QUESTIONNAIRE

Law Office of  
James W. Martin, P.A.  
Attorney at Law  
St. Petersburg, Florida 33705  
www.jamesmartinpa.com  
Email [jim@jamesmartinpa.com](mailto:jim@jamesmartinpa.com)  
Phone (727) 821-0904

Date	
Referred By	

<b>CLIENT</b>	
Your Name as it appears on your driver license	
Email	
Phone	
Address	

<b>DECEDENT</b>	
Legal Name (as it appears on death certificate and driver license)	
Nicknames	
Date of Death	
Age	
Residence Address	
U.S. Citizen?	
Relation to Client	

<b>DECEDENT'S FAMILY</b>		
	<b>Name (as it appears on driver license), Mailing Address, Email Address, and Phone Number</b>	<b>Age Under 18?</b>
Surviving Spouse of Decedent		
Children of Decedent		
Parents of Decedent		
Brothers and Sisters of Decedent, and Descendants of Deceased Brothers and Sisters		
Other		

<b>DECEDENT'S ASSETS</b>		
	<b>Description (address, name of institution, etc.)</b>	<b>\$ Value</b>
Homestead		
Other Real Estate		
Bank Accounts		
IRA and Retirement Accounts		
Investment Accounts		
Businesses		
Life Insurance		
Vehicles		
Jewelry, Furniture, Etc.		
Bank Safe Deposit Box		
Other		

<b>DECEDENT'S POSSIBLE CREDITORS</b>		
	<b>Name and Address</b>	<b>\$ Amount</b>
Mortgages		
Vehicles		
Banks		
Health Care		
Medicaid		
Other		

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

<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			

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