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PROBATE AND TRUST QUESTIONNAIRE

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If you want Mr. Martin to consider taking your case, please fill out this questionnaire and email it to jim@jamesmartinpa.com . Please consider the following:

- Submitting a questionnaire does not create an attorney-client relationship with Mr. Martin.
- No attorney's fee is incurred by having the questionnaire read by Mr. Martin.
- An attorney-client relationship is created only if and when Mr. Martin and the potential client enter into a written fee agreement and the potential client pays the advance fee payment to Mr. Martin's IOTA trust account.
- Communications between attorneys and their clients and potential clients are confidential and privileged from disclosure, whether in person or by phone, email, or otherwise. The privilege could be lost or waived if the client or potential client discloses the communication to someone else. Therefore, please keep your communications with Mr. Martin confidential.

Date	
Referred By	

POTENTIAL CLIENT	
Your Name (as it appears on your driver license)	
Phone Number	
Email Address	
Mailing Address	

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

DECEDENT'S FAMILY		
	Name (as it appears on driver license), Mailing Address, Email Address, and Phone Number	Age Under 18?
Surviving Spouse of Decedent		
Children of Decedent		

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Parents of Decedent (if no surviving spouse or descendant)		
Brothers and Sisters of Decedent, and Descendants of Deceased Brothers and Sisters (if none of the above survived decedent)		
Others named in will or trust		

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

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

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

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Documents			
	Copy Attached?	Dates	Who Has Original
Death Certificate			
Wills			
Codicils			
Separate Writings (Tangible Personal Property)			
Probate Petitions, Notices, Motions, Inventory, and Accountings			
Trust Agreements, Amendments, Restatements, Notices, and Accountings			
Divorce, Marital Prenuptial, Postnuptial			
Other Documents			

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