

CONFIDENTIAL QUESTIONNAIRE

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If you want Mr. Martin to consider taking your probate or trust case, please fill out this questionnaire and email it to **jim@jamesmartinpa.com**

Please consider the following:

- Submitting this questionnaire does not create an attorney-client relationship.
- If Mr. Martin accepts your case, he will send you an engagement letter.

Date	
Referred By	

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

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		

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		

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		

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	

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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