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Questionnaire For Probate

1. **Date of Appointment with attorney:** _____

2. **Client's Personal Data:**

a. Client Name: _____

b. Client's Social Security Number: _____

c. Client's date of birth: _____

d. Client's Home Address: _____

e. Home Phone: _____

f. Client's Employer: _____

g. Work Phone: _____

h. E-mail: _____

i. Alternate e-mail: _____

j. How do you prefer to be contacted (home phone, cell phone, e-mail)?

3. **Decedent's Personal Data:**

a. Decedent's Full Name: _____

b. Date of Death: _____

c. County of Decedent's Residence at Date of Death: _____

d. Decedent's age at death: _____

4. Decedent's Will

- a. Did the Decedent have a Will at the time of death? _____
 - i. If so, date Will executed _____
 - ii. Will executed in what State? _____
 - iii. Executor (Personal Representative) named in Will:

 - iv. Has named Executor accepted/declined to serve? _____
 - v. Alternate Personal Representative named in Will (cite Will's Article and Paragraph):

 - vi. Did declining Executor (if any) file a *Declination to Serve as Personal Representative and Nomination of Alternate Personal Representative*? _____ If so, attach to Petition.
 - 1. Who did declining Executor nominate? _____
 - a. Alternate to serve without bond? _____
 - vii. Will in whose possession? _____
 - viii. Will validly executed to the best knowledge of Petitioner? _____
 - ix. Any instrument existing that revokes the Will? _____
 - x. Will provided to Attorney? _____
 - xi. Has the Will been admitted to Probate in any other jurisdiction? If so, which? _____
 - xii. Is any other application or petition for appointment of a personal representative pending in Court or been granted in any other jurisdiction?

xiii. Names, addresses and relationship of individuals receiving money or property through the Will:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. Attach a separate page if necessary

5. Names of Decedent's Surviving Relatives

- a. Spouse: _____
- b. Children: _____
 - i. _____
 - ii. _____
 - iii. _____
- c. Parents: _____
- d. Siblings: _____
 - i. _____
 - ii. _____
 - iii. _____
- e. Deceased Siblings and their children (list if any deceased sibling's children are deceased and left issue or not:
 - i. _____
 1. _____

- 2. _____
- ii. _____
 - 1. _____
 - 2. _____
- iii. _____
 - 1. _____
 - 2. _____

6. Decedent's Estate

a. Real Estate (including all gas, oil, and mineral interests): description, addresses, counties, and estimated value of real estate decedent owned at death

- i. _____
- ii. _____
- iii. _____

b. Personal Property (description and estimated value)

- i. Vehicles (year, make, model, VIN #): _____

- ii. Financial Accounts (checking, savings, CDs, annuities, etc.)

- iii. Investment Accounts: _____
- iv. Household goods, furniture, electronics, and other miscellaneous household items: _____
- v. Other personal property: _____

7. **Decedent's known creditors to be paid (name, address, and amount owed to creditor):**

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____
- f. _____
- g. Attach a separate page if necessary

8. **Names, Ages, and Addresses of Decedent's Heirs at Law (if different than individuals listed in Section 5):**

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____
- f. _____
- g. _____
- h. Attach a separate page if necessary

i. Are the above named persons the Decedent's ONLY heirs, devisees, and legatees? _____