

Initiating Probate and Appointing Personal Representative

Questionnaire

Deceased's information (person who passed away)

Name _____

Any Alias names _____

Gender ___M ___F Social Security Number: ____ - ____ - ____

Birthdate: _____ Date of Death: _____

Street address at time of passing: _____

Mailing address (if different): _____

Will Information

Is there a Will? ___Y ___N (if yes, the original must be filed with the Court – Need the Original – NO copies).

Are there any codicils/amendments? ___Y ___N (if yes, each must be filed with the Court)

Identify any codicils, including their dates of execution: _____

If there is a will, was a personal representative nominated? ___Y ___N

If yes, who was nominated? _____

Your Information (Applicant/Personal Representative Information)

Name: _____

Address: _____

Will sign documents in: State _____ County: _____

Home Phone: _____ Work Phone: _____

Birthdate: _____

Relationship to Deceased: _____ spouse _____ child _____ heir/devisee _____ sibling

_____ parent Other: _____

Heirs/Devises (who is names in the will to receive assets?)

Name: _____

Address: _____

Relationship to Deceased: _____ spouse _____ child _____ heir/devisee _____ sibling

_____ parent Other: _____

Legal status: _____ adult _____ minor _____ trust

Name: _____

Address: _____

Relationship to Deceased: _____ spouse _____ child _____ heir/devisee _____ sibling

_____ parent Other: _____

Legal status: _____ adult _____ minor _____ trust _____ entity

Please name any living spouse & children of the deceased, if not already named above (attach additional pages if needed).

Name: _____

Address: _____

Relationship to Deceased: _____ spouse _____ child _____ heir/devisee _____ sibling

_____ parent Other: _____

Legal status: _____ adult _____ minor _____ trust _____ entity

Name: _____

Address: _____

Relationship to Deceased: _____ spouse _____ child _____ heir/devisee _____ sibling

_____ parent Other: _____

Legal status: _____ adult _____ minor _____ trust _____ entity

Assets

There are generally three different categories of assets in decedent's estates. They include assets that are solely owned by the decedent, not jointly held with another person, and not payable on death. An example is solely owned real estate. An asset that is jointly held with another person would include joint tenancy assets, which could be real estate or other, such as brokerage accounts. The third categories are assets which are automatically payable on death, which would usually include life insurance, retirement plans, and sometimes brokerage accounts.

For the purpose of this documentation, please include all assets, no matter how held, as long as wholly or partially in the decedent's name. Discussion on how these assets fit into the probate picture if at all.

The best way to provide information on assets is to provide copies of title documents, such as deeds to real estate, bank account statements, investment account statements, investment account statements, business interests, etc. Here are the general categories of assets that we usually find involved in estates:

Real Estates, including timeshares

Bank accounts

Investment (brokerage) accounts

Life Insurance

Retirement Plans

Business Interests

Known Creditors

Please list all known creditors of the deceased. A known creditor is any party of which there is some evidence to believe a claim exists. This can include credit card statements, medical bills, lawsuits, or virtually any other paper that you may locate which may indicate a debt of the deceased. Attach to this form a copy of the bills or statements as well.

Name of Party: _____ Amount of Claim _____

Mailing address: _____

Account #: (if any): _____ Bill/Invoice/Statement attached: _____ Y _____ N

Basis for claim: _____

Name of Party: _____ Amount of Claim _____

Mailing address: _____

Account #: (if any): _____ Bill/Invoice/Statement attached: _____ Y _____ N

Basis for claim: _____

Name of Party: _____ Amount of Claim _____

Mailing address: _____

Account #: (if any): _____ Bill/Invoice/Statement attached: _____ Y _____ N

Basis for claim: _____

Subscribed and sworn to before me this _____ day of _____,
20_____.

My commission expires: _____

Notary Public

SEAL