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Practicing in DFW &  
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Oil and Gas Law  
Wills, Trusts, &  
Estate Planning  
Probate Law  
Real Property Law  
NFA Gun Trusts

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## **INTAKE CHECKLIST FOR THE PROBATE OF AN ESTATE**

### **Biographical Information:**

1. Full name of client: \_\_\_\_\_
2. Address of client: \_\_\_\_\_
3. Phone: \_\_\_\_\_
4. Email: \_\_\_\_\_
5. Relationship to deceased: \_\_\_\_\_
6. Full name of deceased: \_\_\_\_\_
  - Age: \_\_\_\_\_
  - Domicile (State the deceased lived in at death): \_\_\_\_\_
  - Length of time deceased lived in state: \_\_\_\_\_
  - Marital status (Ever been married before? Dates?): \_\_\_\_\_
7. Date of death. \_\_\_\_\_
8. Nature of estate. What is the value of the estate? (More or less than \$75,000.) \_\_\_\_\_  
\_\_\_\_\_
9. Social Security Number (Last three (3) digits ONLY):
  - Decedent: \_\_\_\_\_
  - Applicant: \_\_\_\_\_
10. Driver's License (Last three (3) digits ONLY & STATE):
  - Decedent: \_\_\_\_\_
  - Applicant: \_\_\_\_\_