

**PROBATE WORKSHEETS**  
**PERSONAL INFORMATION**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Bus. Phone: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Driver's License: \_\_\_\_\_ Referred by: \_\_\_\_\_

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Are you seeking appointment as:

\_\_\_\_ Executor    \_\_\_\_ Administrator with will annexed    \_\_\_\_ Administrator  
\_\_\_\_ Special Administrator

Decedent's Name: \_\_\_\_\_

Date of Death: \_\_\_\_\_ Place of Death: \_\_\_\_\_

Street Address @ Time of Death: \_\_\_\_\_  
\_\_\_\_\_

Do you want Independent Administration of Estates Act Authority?    \_\_\_\_ Yes    \_\_\_\_ No

Bond Waiver: \_\_\_\_ Yes    \_\_\_\_ No    Bond Amount: \_\_\_\_\_

Value of Estate Property:

Personal Property	_____
Annual Gross Income From	
Real Property	_____
Personal Property	_____
Real Property	_____

Does the will waive the bond?    \_\_\_\_ Yes    \_\_\_\_ No

Are all beneficiaries adults and willing to waive the bond?    \_\_\_\_ Yes    \_\_\_\_ No

Appointment of Personal Representative:

- ☐ Appointment of executor or administrator with will annexed:
- ☐ Proposed executor is named as executor in the will and consents to act.
  - ☐ No executor is named in the will.
  - ☐ Proposed personal representative is a nominee of a person entitled to Letters.
  - ☐ Other named executors will not act because of
    - ☐ death
    - ☐ declination
    - ☐ others reasons; please specify \_\_\_\_\_
- ☐ Appointment of administrator:
- ☐ Petitioner is a person entitled to Letters.
  - ☐ Petitioner is a nominee of a person entitled to Letters.
  - ☐ Petitioner is related to the decedent as \_\_\_\_\_

Proposed personal representative is a \_\_\_ resident of CA \_\_\_ nonresident of CA

Does the decedent's will preclude administration of the estate under the Independent Administration of Estates Act? \_\_\_ Yes \_\_\_ No

Decedent is survived by:

- ☐ spouse
- ☐ no spouse: \_\_\_ divorced or never married; \_\_\_ spouse deceased
- ☐ child/children: \_\_\_ natural or adopted; \_\_\_ natural adopted by a third party; \_\_\_ no child
- ☐ issue of a predeceased child; \_\_\_ no issue of a predeceased child
- ☐ decedent \_\_\_ is \_\_\_ is not survived by a stepchild or foster child or children who would have been adopted by decedent but for a legal barrier.

Answer if decedent was survived by (1) a spouse but no issue or (2) no spouse or issue (check the *first* box that applies):

- ☐ Decedent is survived by a parent or parents listed below;
- ☐ Decedent is survived by issue of deceased parents listed below;
- ☐ Decedent is survived by a grandparent or grandparents listed below;
- ☐ Decedent is survived by issue of grandparents listed below;
- ☐ Decedent is survived by issue of a predeceased spouse listed below;
- ☐ Decedent is survived by next of kin listed below;
- ☐ Decedent is survived by parents of a predeceased spouse or issue of those parents, if both are predeceased listed below.
- ☐ Decedent is survived by no known next of kin.

Answer if decedent was survived by no spouse or issue:

Decedent \_\_\_ had no predeceased spouse \_\_\_ had a predeceased spouse who (1) \_\_\_ died not more than 15 years before decedent owning an interest in real property that passed to decedent (2) \_\_\_ died not more than five years before decedent owning personal property valued at \$10,000 or ore that passed to decedent; \_\_\_ neither (1) or (2) apply (check the *first* that applies):

- ☐ Decedent is survived by issue of a predeceased spouse listed below;
- ☐ Decedent is survived by a parent or parents of the predeceased spouse listed below;
- ☐ Decedent is survived by issue of a parent of the predeceased spouse listed below;
- ☐ Decedent is survived by next of kin of the decedent listed below;
- ☐ Decedent is survived by next of kin of the predeceased spouse listed below.

List the names, relationships, ages, and addresses so far as known to or reasonably ascertainable of (1) all persons named in decedent's will and codicils, whether living or dead, (2) all persons named or checked in items above, and (3) all beneficiaries of a devisee trust in which the trustee and personal representative are the same person.