

PEPPEL, GRICE & PALAZZOLO, P.C.

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1913 - 2003
BARBARA D. MacINTOSH
(Retired)

September 28, 2017

CLIENT'S GUIDE TO OPENING AN ESTATE IN PROBATE COURT- SHELBY COUNTY, TENNESSEE

I. EMERGENCY ISSUES

1. Burial/ Funeral expenses?
 - a. If you need access to bank accounts/safe deposit box, an emergency motion for access to funds may be necessary.
2. Minor children?
 - a. If minor children, consider temporary and permanent guardianships.
3. Real property?
 - a. Any relatives currently living in property owned by the Decedent? If so, need to consider the disposition of the property.
 - b. Any mortgages or other liens owed on real and personal property (i.e. house, cars, etc.)? If so, would need to contact lienholders as soon as possible to notify of death. Also, need to find the value of the mortgage and, possibly, get an appraisal of the house.

II. FIRST STEPS IN ASSISTING PROBATE ATTORNEY IN OPENING AN ESTATE

1. Start a list of all property and debt owned and owed by the decedent (and spouse), or as many as you can think of.
2. Look for any important documents, such as wills, trust agreements, etc.
3. If you do not know where you start, a tax return provides a great start in your search for assets of the decedent.¹

III. COSTS ASSOCIATED WITH ADMINISTRATION

1. Court costs- \$289.50 (cost of filing + one (1) copy of Letter of Administration)
2. Bond premium²- starting at \$125.00
3. Notice to Creditors- \$55.00
4. Attorney's Fees

¹ The attorney can get prior tax returns from the Internal Revenue Service if you are unable to locate any.

² This amount depends on the value of the Estate.

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CLIENT INFORMATION FORM- ESTATE ADMINISTRATION

PART I - PERSONAL DATA

NAME of DECEASED: _____

Alias Names (if any): _____

Street Address: _____

City, State: _____ Zip Code: _____

Date of Birth: _____ Date of Death: _____

Place of Birth: _____

Social Security Number: _____

Was Decedent a U.S. citizen? Yes: ___ No: ___

If naturalized U.S. citizen, Date and Place of Naturalization: _____

Medical history/diagnosis: _____

Did the Decedent have a Will? Yes: ___ No: ___

NAME of PROPOSED ADMINISTRATOR: _____

Street Address: _____

City and State: _____ Zip Code: _____

Home #: _____ Cell #: _____

Work #: _____ Fax #: _____

Social Security Number: _____ E-mail: _____

Can we e-mail you all pertinent documents about your case? Yes No

Date of Birth: _____ Relationship to Deceased: _____

Owe debt to Deceased? _____

Convicted of any felonies or crimes involving dishonesty? _____

Filed bankruptcy? If so, when? _____

Name of Employer: _____ Position: _____

Emergency Contact: Name: _____ Telephone Number: _____

Address: _____

NAME of ALTERNATE PROPOSED ADMINISTRATOR: _____

Street Address: _____

City and State: _____ State: _____ Zip Code: _____

Home #: _____ Cell #: _____

Work #: _____ Fax #: _____

E-mail: _____

Social Security Number: _____ E-mail: _____

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Date of Birth: _____

Relationship to Deceased: _____

PART II - BENEFICIARIES or HEIRS AT LAW

NAME of SPOUSE/DOMESTIC PARTNER: _____

Street Address: _____

City and State: _____ Zip Code: _____

Home #: _____ Cell #: _____

Work #: _____ Fax #: _____

E-mail: _____ Pgr #: _____

Date of Birth: _____

Social Security Number: _____

Date and place of marriage/domestic partnership: _____

Status of Spouse: ___ Living ___ Deceased ___ Under Conservatorship

CHILDREN'S INFORMATION:

Table with 6 columns: Name, Living, Minor, Disabled, Address, Date of Birth. It contains 8 rows for child information.

For each child, state the name of the child's other parent, if not decedent's surviving spouse or partner. _____

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PART III- ASSETS OF THE ESTATE

Please list the values of the decedent's assets, if known.

	Address/Account Number/Name of Holding Institution	Value	Is Asset Co-Owned
Real Estate: Home			Yes No
Real Estate: Other			Yes No
Stocks/Bonds/Mutual Funds			Yes No
Checking Account			Yes No
Savings Account			Yes No
CDs/Money Market			Yes No
IRAs and 401k/403(b)			Yes No
Vehicles			Yes No
Household furniture			Yes No
Life insurance			Yes No
Prepaid burial and funeral plans			Yes No
Firearms/Art/Gold			Yes No
TOTAL VALUE			

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PART V- DETAILS OF REAL PROPERTY OWNED

REAL PROPERTY			
Address	Mortgage Amount Owed	Owners	Do you have the deed?
			Yes No
			Yes No
			Yes No
			Yes No
			Yes No