Probate Estate Questionnaire

Decedent's full name _____

Surviving spouse? _____

Address _____

City _____   State _____   Zip Code _____

Deceased's name _____   Date of Death _____

Reason of death _____

PERSONAL AND FAMILY DATA

Decedent's Data _____

Social Security Number _____

Date of Birth _____

Place of Birth _____

U.S. Citizen _____

State of Residency _____

Married Date _____

Survivor's Data _____

Social Security Number _____

Date of Birth _____

Place of Birth _____

U.S. Citizen _____

State of Residency _____

Married Date _____

CHILDREN'S DATA
(Age Order -- Oldest to Youngest -- Note if Deceased)

1. Name _____

Address _____

City _____

State _____

Zip Code _____

Telephone number _____

Birthdate _____

Spouse's Name _____

Any children? Name _____   Age _____

Name _____   Age _____

Name _____   Age _____

2. Name _____

Address _____

City _____

State _____

Zip Code _____

Telephone number _____

Birthdate _____   Sex M or F

Spouse's Name _____

1

Any children? Name _____ Age _____

Name _____ Age _____

Name _____ Age _____

3. Name _____

Address _____

City _____

State _____

Zip Code _____

Telephone number _____

Birthdate _____   Sex M or F

Spouse's Name _____

Any children? Name _____ Age _____

Name _____ Age _____

Name _____ Age _____

4. Name _____

Address _____

City _____

State _____

Zip Code _____

Telephone number _____

Birthdate _____   Sex M or F

1

Spouse's Name _____

Any children? Name _____   Age _____

Name _____   Age _____

Name _____   Age _____

Did the deceased have a valid will? _____   **If so please provide this.**

Did the deceased have a valid Trust? _____   **If so please provide this.**

Who are the heirs and beneficiaries (spouse, children, parents)? Name, address, telephone number and relationship:

_____
_____

_____
_____

_____
_____

_____
_____

_____
_____

MISELLANEOUS INFORMATION
Location of Safety Deposit Box _____

In Whose Names(s) _____

Any Property of Others in the Box? _____

Identifiable as Such? _____
1

Where are Other Valuable Papers Kept? _____

Name of Broker _____

Address of Broker _____

Name of Accountant _____

Address of Account _____

Name of Life Insurance Agent _____

Name of Casualty Insurance Agent _____

Address of Casualty Insurance Agent _____

Preference as to Bank _____

ASSETS
A. Real Estate (Husband and/or Wife) _____
                    (PLEASE GIVE ME A COPY OF ALL PROPERTY DEEDS)

Residence Address _____

Brief Description _____

Legal Title in Whose Name _____

Fair Market Value _____   Assessed Value _____

Mortgage: Amount _____   Mortgagee _____

If Property was a gift or is in Joint Names -- Details as to source of property contribution of
each spouse and date or acquisition
_____

_____

A. Real Estate (Husband and/or Wife) _____

Residence Address _____

1

Brief Description _____

Legal Title in Whose Name _____

Fair Market Value _____   Assessed Value _____

Mortgage: Amount _____   Mortgagee _____

If Property was a gift or is in Joint Names -- Details as to source of property contribution of each spouse and date or acquisition
_____

_____

B. Real Estate (Husband and/or Wife) _____

Residence Address _____

Brief Description _____

Legal Title in Whose Name _____

Fair Market Value _____   Assessed Value _____

Mortgage: Amount _____   Mortgagee _____

If Property was a gift or is in Joint Names -- Details as to source of property contribution of each spouse and date or acquisition
_____

_____

C. Real Estate (Husband and/or Wife) _____

Residence Address _____

Brief Description _____

Legal Title in Whose Name _____

Fair Market Value _____   Assessed Value _____

Mortgage: Amount _____   Mortgagee _____
1

If Property was a gift or is in Joint Names -- Details as to source of property contribution of each spouse and date or acquisition

_____

D. Real Estate (Husband and/or Wife) _____

Residence Address _____

Brief Description _____

Legal Title in Whose Name _____

Fair Market Value _____   Assessed Value _____

Mortgage: Amount _____   Mortgagee _____

PLEASE PROVIDE COPIES OF ALL DEEDS FOR THE PROPERTY YOU OWN LISTED ABOVE.
PLEASE MAKE A COPY OF THE LAST BANK STATEMENT FOR THE DESEASED PERSON' S DATE OF LIVING AND INCLUDE IT WITH THIS QUESTIONNAIRE

BANK ACCOUNTS AND SAVINGS ACCOUNTS (Husband or Wife)

1. Name of Bank, Savings and Loan, or Credit Union _____

Average Balance _____   Type Account _____
                                         (checking -- savings)
In Whose Name or Names? _____
Account Number: _____

2. Name of Bank, Savings and Loan, or Credit Union _____

Average Balance _____   Type Account _____
                                         (checking -- savings)
In Whose Name or Names? _____
Account Number: _____

3. Name of Bank, Savings and Loan, or Credit Union _____

Average Balance _____   Type Account _____
1

(checking -- savings)

In Whose Name or Names? _____

Account Number: _____

4. Name of Bank, Savings and Loan, or Credit Union _____

Average Balance _____   Type Account _____
(checking -- savings)

In Whose Name or Names? _____

Account Number: _____

5. Name of Bank, Savings and Loan, or Credit Union _____

Average Balance _____   Type Account _____
(checking -- savings)

In Whose Name or Names? _____

Account Number: _____

6. Name of Bank, Savings and Loan, or Credit Union _____

Average Balance _____   Type Account _____
(checking -- savings)

In Whose Name or Names? _____

Account Number: _____

Mortgages Owned, Land Contracts or Other Receivables _____

_____

_____

_____

Stocks and Bonds (Husband and/of Wife)

Appropriate market value _____

Listed and Quoted issues value _____

Approximate market value and describe _____

1

_____

_____

Life Insurance

Husband's Life and Accidental Death Insurance

Face Amount	Type	Policy No.	Name of Company	Beneficiaries	Amount of Loan on Policy	Cash Value
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Is the insured the owner's of the policies?   If not, give details _____

_____

Life Insurance