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INFORMATION TO BE OBTAINED FROM CLIENT TO PROBATE AN ESTATE

INFORMATION ON DECEDENT (THE PERSON WHO PASSED AWAY):

1. Decedent's **full** name:

2. Date of birth:

3. Date of death (attach copy of death certificate):

4. Place of death, (**including county**):

5. Former names, if any, (i.e. maiden name and last name in any previous marriages):

6. Residence address (**including county**) at the time of death:

7. Spouse's name (if any): _____

8. Previous marriages (if any):

A. Name of former spouse(s), how marriage terminated and date of termination (if by divorce, provide the title of the divorce document, the case number, the court in which the divorce was granted, including county and state, and the date the divorce was granted; if by death, the date of death of the spouse): _____

CHILDREN OF DECEDENT:

A. Each child of present marriage:

1. Name: _____

2. Date of birth: _____ Sex: _____

3. Address: _____

4. Phone Number: _____

5. Other parent's name: _____

6. Descendants: _____

1. Name: _____

2. Date of birth: _____ Sex: _____

3. Address: _____

4. Phone Number: _____

5. Other parent's name: _____

6. Descendants: _____

1. Name: _____

2. Date of birth: _____ Sex: _____

3. Address: _____

4. Phone Number: _____

5. Other parent's name: _____

6. Descendants: _____

1. Name: _____

2. Date of birth: _____ Sex: _____

3. Address: _____

4. Phone Number: _____

5. Other parent's name: _____

6. Descendants: _____

1. Name: _____

2. Date of birth: _____ Sex: _____

3. Address: _____

4. Phone Number: _____

5. Other parent's name: _____

6. Descendants: _____

B. Each child of a previous marriage:

1. Name: _____
2. Date of birth: _____ Sex: _____
3. Address: _____
4. Phone Number: _____
5. Other parent's name: _____
6. Descendants: _____

1. Name: _____
2. Date of birth: _____ Sex: _____
3. Address: _____
4. Phone Number: _____
5. Other parent's name: _____
6. Descendants: _____

1. Name: _____
2. Date of birth: _____ Sex: _____
3. Address: _____
4. Phone Number: _____
5. Other parent's name: _____
6. Descendants: _____

C. Each deceased child:

1. Name: _____
2. Names and addresses of his or her heirs or next of kin:

3. Information regarding the date and place of death:

PARENTS OF DECEDENT:

A. Father:

1. Name: _____
 2. Date of birth: _____
 3. Date of death (if applicable): _____
 4. Address (if applicable): _____
- _____

B. Mother:

1. Name: _____
 2. Date of birth: _____
 3. Date of death (if applicable): _____
 4. Address (if applicable): _____
- _____

SIBLINGS OF DECEDENT:

1. Name: _____
2. Date of birth: _____ Sex: _____
3. Address: _____
4. Phone Number: _____
5. Other parent's name: _____
6. Descendants: _____

1. Name: _____
2. Date of birth: _____ Sex: _____
3. Address: _____
4. Phone Number: _____
5. Other parent's name: _____
6. Descendants: _____

1. Name: _____
2. Date of birth: _____ Sex: _____
3. Address: _____
4. Phone Number: _____
5. Other parent's name: _____
6. Descendants: _____

1. Name: _____
2. Date of birth: _____ Sex: _____
3. Address: _____
4. Phone Number: _____
5. Other parent's name: _____
6. Descendants: _____

DECEDENT'S PROPERTY AT DEATH:

A. Real Estate:

1. Address: _____
Mortgage company: _____
Mortgage balance: \$ _____
Estimated fair market value: \$ _____
Year bought: _____
Separate or Community?

2. Address: _____
Mortgage company: _____
Mortgage balance: \$ _____
Estimated fair market value: \$ _____
Year bought: _____
Separate or Community?

B. Motor Vehicles, Boats, Airplanes, Cycles, Trailers:

1. Year: _____ Model: _____
Mortgage with: _____
Account number: _____
Balance owed: _____
Separate or Community?

2. Year: _____ Model: _____
Mortgage with: _____
Account number: _____

Balance owed: _____

Separate or Community?

C. Bank Accounts, Savings Accounts, C.D.'s, Credit Union, Savings Bonds:

1. Name of bank: _____

Account type: _____

Account number: _____

Amount on deposit at death: \$ _____

Names on withdrawal card: _____

Separate or Community?

2. Name of bank: _____

Account type: _____

Account number: _____

Amount on deposit at death: \$ _____

Names on withdrawal card: _____

Separate or Community?

3. Name of bank: _____

Account type: _____

Account number: _____

Amount on deposit at death: \$ _____

Names on withdrawal card: _____

Separate or Community?

4. Name of bank: _____

Account type: _____

Account number: _____

Amount on deposit at death: \$ _____

Names on withdrawal card: _____

Separate or Community?

D. Life Insurance:

1. Name of company: _____

Account number: _____

Term or Whole Policy?

Amount: _____

Designated beneficiaries: _____

2. Name of company: _____

Account number: _____

Term or Whole Policy?

Amount: _____

Designated beneficiaries: _____

E. Stocks, Mutual Funds:

1. Name of stock: _____

Account number: _____

Estimated value: \$ _____

Designated beneficiaries: _____

Separate or Community?

2. Name of stock: _____
Account number: _____
Estimated value: \$ _____
Designated beneficiaries: _____
Separate or Community?

F. Retirement, Pensions, Other Company Benefits:

1. Did Decedent participate in any retirement plan?
If so, how much did Decedent have in that savings plan?
\$ _____
Account number: _____
Designated beneficiaries: _____
Separate or Community?
2. Did Decedent participate in any company savings plan?
If so, how much did Decedent have in that savings plan?
\$ _____
Account number: _____
Designated beneficiaries: _____
Separate or Community?
3. Did anyone owe Decedent or the spouse any money?
If so, how much? \$ _____
Owed by whom? _____

DECEDENT'S DEBTS AT DEATH: (Other than house and/or automobiles)

1.	_____	\$ _____
2.	_____	\$ _____
3.	_____	\$ _____
4.	_____	\$ _____
5.	_____	\$ _____
6.	_____	\$ _____
7.	_____	\$ _____
8.	_____	\$ _____
9.	_____	\$ _____
10.	_____	\$ _____

THIS INFORMATION SHEET IS THE BASIS FOR PROBATING THE DECEDENT'S ESTATE AND SHOULD BE RETURNED TO:

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