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**PROBATE/HEIRSHIP QUESTIONNAIRE**

1. Name of Decedent: \_\_\_\_\_

2. Decedent's date of death: \_\_\_\_\_

3a. Decedent's date of birth: \_\_\_\_\_

3b. Decedent's social security number: \_\_\_\_\_

3c. Location and owner of any safe deposit box in which Decedent stored property:

\_\_\_\_\_

4. Decedent's address at date of death: \_\_\_\_\_

\_\_\_\_\_

5. Decedent's permanent residence at date of death: \_\_\_\_\_

\_\_\_\_\_

6a. Name and address of surviving spouse (if any): \_\_\_\_\_

\_\_\_\_\_

6b. List other marriages of the Decedent, how each ended (death or divorce), when each ended, and children born to, or adopted during, each marriage. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

6c. Provide a copy of all marital (partition) agreements executed by Decedent.

6d. Provide a copy of all divorce decrees in which Decedent was a party.

7. Name and address of surviving children (if any):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

8. Names of deceased children and dates of death:

\_\_\_\_\_

\_\_\_\_\_

9. If Decedent died testate {Last Will and Testament existed}:

(a) Date of Will (and codicils, if any): \_\_\_\_\_

(b) Addresses and phone numbers of all named beneficiaries:

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10. If Decedent died intestate {Last Will and Testament **DID NOT** exist}:

(a) Name and address of spouse, children, and other lineal descendants:

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(b) If there are no lineal descendants, the name and address of parents, siblings, and other collateral relatives:

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11. Property owned by decedent at date of death:

(a) Real estate. For each tract, provide the following:

- Copy of deed.
- Copy of most recent tax statement.
- Copies of mortgage information (if any).
- Copies of applicable leases affecting the land.

(b) Personal property. Provide the following:

Bank and brokerage accounts:

- Copy of monthly statements covering the date of death.
- Copies of all signature cards or "Account Opening" agreements.

Life insurance (in which the Decedent had an ownership interest):

- Copies of policies.
- Copies of beneficiary designations.
- Contact information for beneficiaries.

Life insurance (that are payable due to Decedent's death):

- Copies of policies.
- Copies of beneficiary and ownership designations.

Stocks and bonds:

- Copies of all stocks and bonds held by Decedent in certificate form (not in a brokerage account).

Vehicles:

- Copies of all original titles.

Miscellaneous:

- Descriptions (and valuations, if any) of all other assets owned by decedent.

Debts:

- Descriptions of all debts owed by decedent (credit cards, mortgages, etc.).

12. Of the property listed in question 11, list all property that was owned by Decedent prior to marriage or that was received by Decedent during the marriage by gift or inheritance.

13. Provide copies of all gift tax returns filed by Decedent or his spouse(s).

14. Provide copies of Decedent's personal income tax returns for the last three years.