

PROBATE QUESTIONNAIRE

GOODMAN LAW FIRM, P.C.

Today's Date: ___/___/___

Intake Atty:

Decedent's Full Legal Name: _____ Date of death: ___/___/___

Decedent's Social Security Number: _____

Address at time of death: _____ County: _____

Occupation at time of death: _____ Employer: _____

Relationship of client to decedent: _____

- Last Will & Testament
- List of heirs (names, addresses & SSN)
- Retainer
- List of all financial institution accounts
- List of all stocks, bonds, IRAs, 401K
- Death certificate
- Deed to all real estate
- Signed fee agreement
- All insurance policies
- Title to all motor vehicles
- List of creditors

REAL PROPERTY

<u>Description</u>	<u>Market Value</u>	<u>Amt. of Encumbrances</u>

VEHICLES

(Cars, Boats, Trailers, Motorcycles, Motor homes, Airplanes, etc.)

<u>Description</u>	<u>Market Value</u>	<u>Amt. of Encumbrances</u>

CASH AND DEPOSIT ACCOUNTS

(Banks, Savings & Loans, Credit Unions, Savings, Checking, Certificates of Deposit, Money Market Accounts, etc.)

<u>Description & Account No.</u>	<u>Value</u>

STOCKS AND BONDS

<u>Description</u>	<u>Market Value</u>	<u>Amt. of Encumbrances</u>
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LIFE INSURANCE

<u>Description</u>	<u>Face Value</u>	<u>Cash Value Against Policy</u>	<u>Amt. of Loans</u>
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PENSIONS, PROFIT SHARING, RETIREMENT ACCOUNTS, ANNUITIES

<u>Description</u>	<u>Estimated Value</u>	<u>Encumbrances</u>
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BUSINESS INTERESTS

(Partnerships, Corporations, etc.)

<u>Description</u>	<u>Estimated Value</u>	<u>Encumbrances</u>
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ACCOUNTS RECEIVABLE

(Notes, Contracts, Mortgages, Debts)

<u>Description</u>	<u>Gross Value</u>
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HOUSEHOLD FURNITURE, FURNISHINGS, APPLIANCES

Description

Gross Value

PROPERTY WITH INTRINSIC OR ARTISTIC VALUE

(Art Objects, Paintings, Antiques, Rare Books, Coins, Stamps, Jewelry, Heirlooms, etc.)

Description

Market Value

Amt. of Encumbrances

OTHER PROPERTY OF VALUE OVER \$50.00

(Televisions, Cameras, Stereos, Radios, China, Silver, Lawnmowers, Barbecues, Recreational Equipment, etc.)

Description

Market Value

Amt. of Encumbrances

DEBTS & OTHER LIABILITIES

Name of Creditor

Present
Balance Debt

Purpose of

Security for
Debt, if any

CHILDREN
(Natural or Adopted)

<u>Name</u>	<u>Date of Birth</u>	<u>Address</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

BROTHERS & SISTERS
(Natural or Adopted)

<u>Name</u>	<u>Date of Birth</u>	<u>Address</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

PARENTS
(Natural or Adopted)

<u>Name</u>	<u>Date of Birth</u>	<u>Address</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

CERTIFICATION

By my signature below, I certify that all of the information herein is true and correct to the best of my knowledge.

Dated: _____

Signature: _____