

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 &amp; 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

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**PROPERTY WITH INTRINSIC OR ARTISTIC VALUE**

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

Description

Market Value

Amt. of Encumbrances

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**OTHER PROPERTY OF VALUE OVER \$50.00**

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

Description

Market Value

Amt. of Encumbrances

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**DEBTS & OTHER LIABILITIES**

Name of Creditor

Present  
Balance      Debt

Purpose of

Security for  
Debt, if any

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**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: \_\_\_\_\_