



## PROBATE QUESTIONNAIRE

TO THE CLIENT: The following information is necessary to allow us to properly file the initial documents for your probate case. This is information which the Court requires and which only you can provide. Please carefully answer all questions to the best of your ability. If you cannot answer a question, please state why. Thank you for properly completing this form.

1. Your name: \_\_\_\_\_

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

Your relationship to the decedent: \_\_\_\_\_

Race \_\_\_\_\_ Weight \_\_\_\_\_

Height \_\_\_\_\_ Eye Color \_\_\_\_\_ Hair Color \_\_\_\_\_

2. Name of the decedent: \_\_\_\_\_

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Date of Death

\_\_\_\_\_  
Social Security Number

3. Your current address: \_\_\_\_\_  
\_\_\_\_\_

4. Decedent's last address: \_\_\_\_\_  
\_\_\_\_\_

5. Did the decedent execute a Will?: \_\_\_\_\_

If yes, in which state was the Will executed?: \_\_\_\_\_ When was it executed?: \_\_\_\_\_

Are you aware of any documents revoking, modifying, or amending the Will?: \_\_\_\_\_

Did the Will name a personal representative?: \_\_\_\_\_

If yes, name the person named in the Will if it is someone other than yourself: \_\_\_\_\_

Did the decedent leave behind any immediate family not named or mentioned in the Will, or expressly disinherit anyone through the Will or other documents?: \_\_\_\_\_

If yes, please identify them and their relationship to the decedent: \_\_\_\_\_  
\_\_\_\_\_

6. List the names, ages, and indicate the relationship to the decedent of the surviving spouse, children, siblings, parents, and any others named in the Will who could inherit from the estate (attach additional pages if necessary):

<b>NAME</b>	<b>AGE</b>	<b>RELATIONSHIP</b>	<b>ADDRESS</b>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

7. List the identities of any known creditors:

\_\_\_\_\_  
\_\_\_\_\_

8. Is there now, or do you anticipate there being another individual who wishes to become personal representative?: \_\_\_\_\_

9. Have you received any demands for notice by any parties interested in the estate?: \_\_\_\_\_

10. Please list the approximate value of the estate: \_\_\_\_\_

11. Do you anticipate any disputes concerning administration of the estate amongst surviving heirs? If yes, please explain briefly: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

12. Do you have any other concerns or issues pertaining to the administration of the estate?:

\_\_\_\_\_  
\_\_\_\_\_

Thank you for completing this form.