SILVERMAN LAW OFFICES
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Initiating Probate and Appointing Personal Representative
Questionnaire

Deceased's Information

Name: ____

Gender: ❑male ❑ female Social Security Number:____-_____-_____

Birth date: __________________Death date: __________________Age: _________

Marital status: ❑single ❑ married

Street address: ____

____

Mailing address (if different): ____

____

Will Information

Is there a will? ❑ Yes ❑No (if yes, it must be filed with the court—**we will need the original**)

Are there any codicils/amendments? ❑Yes ❑No (if yes, each must be filed with the court)

Identify any codicils, including their dates of execution: __________________

____

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____

If there is a will, was a personal representative nominated? ❑ Yes ❑No

If yes, who was nominated? ____

Your Information (Applicant/Personal Representative Information)

Name: ____

Will sign documents in: State: ___________County: _________________________

Mailing Address: ____

____

Home Phone No: __________________Work Phone No: ____________________

Birth date: ________________________Social Security Number:___-_____-_____

Race: __________________Height:______________Weight:_________________

Hair Color: ______________Eye Color: ___________

Relationship to Deceased: ❑spouse ❑child ❑heir/devisee ❑sibling ❑parent
❑Other: ____

____

Heirs/Devisees (These are people who will inherit from the decedent) (attach additional pages if needed)

Name: ____❑male ❑female
❑entity
Relationship to Decedent: ❑spouse ❑child ❑heir/devisee ❑other: ____________

____

Legal status: ❑adult ❑minor ❑trust Birth date (if minor): ___________________
Street address: ____

____

Mailing address (if different): ____

____

Name: ____❑male ❑female
❑entity
Relationship to Decedent: ❑spouse ❑child ❑heir/devisee ❑other: ____________

____

Legal status: ❑adult ❑minor ❑trust Birth date (if minor): ___________________
Street address: ____

____

Mailing address (if different): ____

____

Name: ____❑male ❑female ❑entity
Relationship to Decedent: ❑spouse ❑child ❑heir/devisee ❑other: ___________
____
Legal status: ❑adult ❑minor ❑trust Birth date (if minor): __________________
Street address: ____
____
Mailing address (if different): ____
____

Name: ____❑male ❑female ❑entity
Relationship to Decedent: ❑spouse ❑child ❑heir/devisee ❑other: ___________
____
Legal status: ❑adult ❑minor ❑trust Birth date (if minor): __________________
Street address: ____
____
Mailing address (if different): ____
____

Name: ____❑male ❑female ❑entity
Relationship to Decedent: ❑spouse ❑child ❑heir/devisee ❑other: ___________
____
Legal status: ❑adult ❑minor ❑trust Birth date (if minor): __________________
Street address: ____
____
Mailing address (if different): ____
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Assets

There are generally three different categories of assets in decedent's estates. They include assets that are solely owned by the decedent, not jointly held with another person, and not payable on death. An example is solely owned real estate. An asset that is jointly held with another person would include joint tenancy assets, which could be real estate or other, such as brokerage accounts. The third category are assets which are automatically payable on death, which would usually include life insurance, retirement plans, and sometimes brokerage accounts.

For the purpose of our investigation, please include all assets, no matter how held, as long as wholly or partially in the decedent's name. We will discuss with you how those assets fit into the probate picture if at all.

The best way to provide information on assets is to provide copies of title documents such as deeds to real estate, bank account statements, investment account statements, business interests etc. Here are the general categories of assets that we usually find involved in estates:

Real Estate, including timeshares

Bank accounts

Investment (brokerage) accounts

Life Insurance

Retirement Plans

Business interests