

PROBATE – INFORMATION SHEET

DECEDENT'S INFORMATION:

Name of Decedent: _____ Date of Death: _____

Residence of Decedent: _____

Did the Decedent have a Will? YES / NO

Have you located the original Will? YES / NO

Do you have a Certified Death Certificate? YES / NO

EXECUTOR/ADMINISTRATOR'S INFORMATION:

Name: _____ Date of Birth: _____

Address: _____

Email Address: _____ Telephone No: _____

(If Co-Executors named in Will)

Name: _____ Date of Birth: _____

Address: _____

Email Address: _____ Telephone No: _____

DECEDENT'S PROPERTY:

Real Estate:

Did the Decedent own Real Estate? YES / NO

Was the Real Estate owned with anyone else? YES / NO

Was there a Mortgage on the property? YES / NO

Is Real Estate in another State? YES / NO

Address of Real Estate: _____

Mortgage: Name of Lender: _____

Account No: _____ Payment Amount: _____

Address of Additional Real Estate: _____

Mortgage: Name of Lender: _____

Account No: _____ Payment Amount: _____

TOTAL ESTIMATED VALUE OF REAL ESTATE: \$ _____

Personal Property (Estimated):

Cash: \$ _____

Household Furnishings: \$ _____

Vehicles, RV's, Tools, Livestock, Jewelry, Etc.:

Description of Property	Estimated Value
_____	\$ _____
_____	\$ _____
_____	\$ _____

Investments (Mutual Funds, Stocks & Bonds, Etc...):

Financial institute	Beneficiary (if any)	Estimated Value
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Bank Accounts:

Name of Bank	Checking / Savings	Account Balance
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Is any Debt owed to the Decedent? YES / NO Amount: \$ _____**TOTAL ESTIMATED VALUE OF PERSONAL PROPERTY: \$ _____**

HEIRS / BENEFICIARIES OF DECEDENT'S ESTATE:

Name & Address of Decedent's Spouse (if Living):

Name & Address of Decedent's Children (Born or Adopted):

Was the Decedent pre-deceased by any Child (including adopted)? YES / NO

If yes, Name of Child no longer living: _____

If yes, Name & Address of deceased child's issue (grandchildren):

If Decedent had a will...

Name, Address, and Relationship of any Beneficiaries Named in Will (not named above):

ADDITIONAL INFORMATION / NOTES:
