



Questionnaire

Probate Estate Administration

**** *Personal, Confidential & Privileged* ****

I. Family Information

A. Decedent

1. Full name _____
2. Also known as _____
3. Address(es) at date of death _____

4. Date of death _____
5. Place of death _____
6. Date of birth _____
7. Place of birth _____
8. Domicile (if different from address) _____

9. Date domicile established _____
10. Social Security Number _____
11. Citizenship _____
12. Veteran/branch of service _____
13. I.D. number _____
14. Employer (at time of death) _____
15. Occupation _____

B. Decedent Spouse (if any)

1. Full name _____
2. Address _____

3. Social Security Number _____
4. Date of birth _____
5. Was marriage terminated prior to Decedent's death? Yes No
If yes, date of termination: _____
If yes, by death or divorce? _____

If Decedent married more than once:

- Name of spouse _____
- Date of marriage _____
- Place of marriage _____
- Domicile at date of marriage _____
- Date of marriage _____

Date of termination of marriage _____

By death or divorce? _____

Name of spouse _____

Date of marriage _____

Place of marriage _____

Domicile at date of marriage _____

Date of marriage _____

Date of termination of marriage _____

By death or divorce? _____

C. Family Information

Children of Decedent (list surviving children first):

Full Name	Date of Birth and Date of Death <i>(if deceased)</i>	Address

Parents of Decedent:

Full Name	Date of Death <i>(if deceased)</i>

Siblings of Decedent:

Full Name	Relationship	Full or Half Sibling?

I. Fiduciary Information

A. Executor¹

- 1. Name _____
- 2. Home address _____

- 3. Home phone _____
- 4. Mobile phone _____
- 5. Personal e-mail address _____
- 6. Business address _____

- 7. Business phone _____
- 8. Business e-mail address _____

B. Trustee²

- 9. Name _____
- 10. Home address _____

- 11. Home phone _____
- 12. Mobile phone _____
- 13. Personal e-mail address _____
- 14. Name of trust officer *(if a corporate trustee)* _____
- 15. Title of trust officer *(if a corporate trustee)* _____
- 16. Trust officer e-mail address _____

C. Professional Advisors

- 1. Name of Accountant _____
Address _____
Phone _____
E-mail address _____
- 2. Name of Insurance Agent/Consultant _____
Address _____
Phone _____
E-mail address _____
- 3. Name of Investment Advisor _____
Address _____
Phone _____
E-mail address _____
- 4. Name of Banker _____
Address _____
Phone _____
E-mail address _____

D. Miscellaneous Data

1. Was the Decedent making payments pursuant to a divorce or property settlement order? Yes No

If yes, please send a copy with this Questionnaire.

2. Was the Decedent a signatory on a foreign bank account? Yes No

If yes, please describe _____

3. Was the Decedent a party to any judicial proceedings or lawsuits? Yes No

If yes, please describe _____

E. Documents To Bring To First Meeting With Attorney (*copies or originals*):

1. Wills and all codicils
2. Death certificate
3. Trusts (and any trust amendments) established by Decedent
4. Trusts of which decedent or another family member is a beneficiary
5. Gift tax returns filed by Decedent and/or Decedent's spouse
6. Court documents from any lawsuit or judicial proceeding involving Decedent