



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 (if deceased) | Address |
|------------------|--|----------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Parents of Decedent:

| Full Name | Date of Death (if deceased) |
|------------------|------------------------------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

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 _____

¹An executor is the person (or banking institution) responsible for taking control of decedent's property, winding up decedent's affairs and distributing decedent's estate in accordance with his or her will.

²A trustee is the person (or banking institution) who holds, manages and invests assets for the benefit of either the decedent or other person(s) for whom such an arrangement is desirable.

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