

PROBATE QUESTIONNAIRE
Law Office of Ray Kowalczewski, P.A.

The purpose of this form is to provide me with all the information necessary to open the estate. If you have any questions, please call me. (Please Note: It is better to provide me with more information than I need rather than not enough information.)

The Inventory and Valuation (page 5) does not need to be returned to me immediately, but you may want to get started on it as I will ask for it to be completed after we get the probate administration started. I will also need to review the documentation to verify ownership (deeds for real estate, statements for investments accounts, etc.). As noted on page 5, I do not need a detailed list of the furniture, household goods and wearing apparel, unless it has substantial value (e.g. antiques or other collectibles). Please call me if you have any questions.

Date this form was completed: _____

1. Full Name of decedent (please also include any nicknames used by decedent):
2. Date of death:
3. Residence (Street-City-County-State-Zip):
4. State of domicile at death:
 - a. Year in which domicile established:
5. Social Security No.:
6. Place of death:
 - a. Cause of death:
 - b. Length of last illness:
7. Date of birth:
8. Place of birth:
9. Business or occupation:
 - a. If retired, state former Business or occupation:
 - b. Business address:
 - c. Employer identification number (EIN), if any:
10. Decedent's physicians:
 - a. If decedent was confined in a hospital during his last illness or within three years prior to death, give name and address of hospital.

11. Did decedent have a Last Will and Testament (a Will)? Yes or No

If yes, please provide me with the original copy (with all Codicils and Lists disposing of Tangible personal property). If you cannot provide me with an original copy of the Will, please provide me with the following information:

- a. Date of Will:
- b. Who has physical possession of the original Will:
 - i. Please provide address and phone for person/entity possessing original Will:

- c. Draftsman of will:
 - i. Address and telephone number of draftsman:

- d. Were there any Codicils to the Will (codicils are amendments/updates to the Will)?
 - i. If yes, please provide date:

- e. Was there a Statement or List disposing of Tangible personal property?
 - i. If yes, please provide date:

- f. Names and addresses of witnesses to the Will (if no self-proving affidavit):

12. Probate Petition will be signed by:

- a. Relation to Decedent:
- b. Address:

- c. Telephone:

13. Executor or administrator, (if different from person signing petition):

- a. Relation to Decedent:
- b. Address:

- c. Telephone:

14. Heirs, legatees and devisees (include all children (living and deceased, natural and adopted)) and all persons named in the will in any manner (even if they have been disinherited). I also need Social Security Numbers for anyone who may inherit money through the estate.

Name	Relation	Age	Address	SS#
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(It is important to get the names and addresses of all the heirs.)

USE ADDITIONAL SHEETS, IF NECESSARY

15. Name of Surviving Spouse, if any:

- a. Date of marriage to surviving spouse:
- b. State of Domicile at time of marriage:
- c. Date of birth of surviving spouse:
- d. If spouse is deceased, indicate date of death:

16. If decedent was divorced, indicate name of former spouse, date and place of decree (obtain copy of decree, if possible):

17. If decedent adopted a child, indicate name, date and place of adoption:

18. Name of accountant (or other person possessing financial and tax information about decedent):

- a. Address:
- b. Telephone:

19 Did decedent have a Safe Deposit Box? Yes or No

If Yes:

- a. Name of bank or safe deposit company:
- b. Address:
- c. Names of person authorized to enter safe deposit box:
- d. Who has keys:

20. Approximate Value of Assets in Probate Estate:

- a. Cash (or Cash Equivalents):
- b. Stock, Bonds Mutuals Funds:
- c. Real Estate:
- d. Other:

- e. TOTAL VALUE:

21. Debts of decedent (PLEASE NOTE: The law requires us to notify all known creditors of the existence of the Probate Estate. Failure to do so could cause problems in the future.)

Name of creditor	Nature of debt	Amount	Security, if any
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USE ADDITIONAL SHEETS, IF NECESSARY

22. What insurance coverage is in effect, or needed for assets of the estate? (e.g., homeowners insurance, car insurance, business insurance, etc.)

23. Transfers of Assets (cash, real estate or other property).

- (a) Did the decedent transfer \$12,000 or more within the one year preceding date of death: Yes or No

If yes, please provide details:

Date	Person to whom transferred	Nature of transfer	Value
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- (b) Was gift tax return filed?
If so, when?

- (c) Any transfers or trusts which take effect in possession or enjoyment of property at or after the death of decedent:

Value of such transfers or trusts:

- (d) General powers of appointment:

Value:

INVENTORY AND VALUATION
(add additional sheets, if necessary)

REAL ESTATE

<u>Full Property Address</u> (including legal description)	<u>Value</u> (include annual income, if any)
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PLEASE PROVIDE ME WITH COPIES OF ALL DEEDS TO PROPERTY LISTED ABOVE.

INVESTMENTS: STOCKS, MUTUAL FUNDS & BONDS

<u>Description</u>	<u>Value</u>
Type of Asset	
Name of Financial Institution/Company [e.g., Vanguard Brokerage Account]	

PLEASE PROVIDE ME WITH COPIES OF ALL STATEMENTS TO INVESTMENTS LISTED ABOVE.

BANK ACCOUNTS & CASH
(including any mortgages or notes owed to decedent)

<u>Description</u>	<u>Value</u>
Type of Account	
Name of Bank	

FURNITURE, HOUSEHOLD GOODS, AND WEARING APPAREL

<u>Description</u>	<u>Value</u>
(Do not list everything in detail, I just need an estimate)	

ANY OTHER PROPERTY NOT INCLUDED ABOVE

<u>Description</u>	<u>Value</u>
Vehicles: Year, Make, Model & VIN	