**PROBATE INTAKE FORM**

Please complete this form with the requested information and bring with you to meet with us. The information provided will be required before filing a petition before the court. If you are unsure of any information requested, please so indicate.

*Client Information*

Name: Address:

Home Phone:

Work phone:

Cell phone:

Birth Date: Employer:

SS#:

Occupation:

Relationship to Decedent:

*Decedent Information*

Name: Residence: Date of Death: Place of Death: Age: Cause of death:

Did decedent sign a Will? If yes, please bring original. DO NOT REMOVE STAPLES!

Address of Real Property/Properties Owned by Decedent:

Financial Accounts Owned by Decedent and Values (List any joint tenants or beneficiaries):

Life insurance policies, values and beneficiaries:

Name of Funeral Home:

Funeral Cost: Paid by whom?

*Decedent Family Information* (Name and Address for each. If deceased, list date of death.) Mother: Father: Spouse: Children (Indicate son/daughter – If a son or daughter is deceased, list his or her children):

Siblings (Indicate brother/sister – If a brother or sister is deceased, list his or her children):

*Please check if any of the following apply:*

 Decedent owns rental or other income-producing property

 Decedent has known creditors

 Decedent received private care by family or other non-paid worker prior to death

 Decedent has minor or disabled children

 Client believes that controversy may arise among family members or other family has already hired attorney

 Decedent had signed trust of any kind

 Money may have been withdrawn without decedent’s consent prior to death

 Client or other person served as agent under power of attorney

 Client or other person served as guardian

 Estate proceedings have been filed in another state or county