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PROBATE QUESTIONNAIRE

For an estate without a will

Please tell us what you know. It is fine to leave an answer blank or write "Not sure." Estimates are helpful. You do not need to gather every document before returning this form. We will work through the remaining details with you.

1. About you and the person who died

Your name

Your relationship to the person

Phone

Email

About the person who died

Full legal name

Other names used, if any

Date of birth

Date of death

Last home address, including city, state and ZIP

County and state where they lived at death

Did the person ever sign a will, or do you think a will may exist?

- ○ Yes
- ○ No
- ○ Not sure

If yes or not sure, where might the will or a copy be found?

Has anyone already filed a probate case or been appointed to handle the estate?

- ○ Yes
- ○ No
- ○ Not sure

If yes, court, case number and appointed person, if known

2. Family information

Marital status when they died

- ○ Married
- ○ Widowed
- ○ Divorced
- ○ Never married
- ○ Separated
- ○ Not sure

Spouse's name and best phone or email, if married or separated

List all children, including those who have died, adopted children, and children from any relationship. Attach a list if you need more room.

Full name	Age or birth date	Living, or date of death	Address / phone / email, if known

Did any child die before this person?

- ○ Yes
- ○ No
- ○ Not sure

Did any child die after this person?

- ○ Yes
- ○ No
- ○ Not sure

For any child who has died: name, date of death, names of their children or other descendants, and any probate case you know about.

Other family: parents, siblings, and children of deceased siblings (names and whether living)

Please check anything we should follow up on:

- ☐ Someone is under 18 or needs help managing their affairs
- ☐ Someone cannot be located
- ☐ An adoption or family relationship needs clarification
- ☐ None of these known

Brief explanation, if needed

3. Property and bills

Check what you know about. Rough estimates are enough; we can request detailed records later.

- [ ] Home or other real estate
- [ ] Bank accounts or cash
- [ ] Vehicles, boats or recreational vehicles
- [ ] Investments, retirement accounts or life insurance
- [ ] Business interests
- [ ] Other valuable property or a legal claim
- [ ] Not sure

Approximate total value of assets, if known

Briefly describe the assets and where accounts or records can be found.

Real estate: property address, who lives there, and any mortgage or property-tax issues

Was anything jointly owned, held in a trust, or payable to a named beneficiary?

- ○ Yes
- ○ No
- ○ Not sure

If yes, brief details

Bills and expenses

- [ ] Mortgage or vehicle loan
- [ ] Credit cards, medical bills or personal loans
- [ ] Taxes or government claims
- [ ] Other debts or lawsuits
- [ ] None known
- [ ] Not sure

Known debts and expenses (rough amounts are fine). Who paid funeral or other estate expenses, and how much?

4. Next steps and immediate needs

Who would you like to handle the estate?

Relationship to the person who died

Best phone or email for this person

Has this person agreed to help?

- ○ Yes
- ○ No
- ○ Not yet discussed

Do you expect anyone to disagree about the estate or who should handle it?

- ○ Yes
- ○ No
- ○ Not sure

Brief explanation, if needed

Does anything need attention right away?

- ☐ Foreclosure, overdue mortgage or property taxes
- ☐ Insurance or utilities may lapse
- ☐ Property or money is being taken or transferred
- ☐ A business, rent or estate funds need attention
- ☐ A court, lawsuit or tax deadline is approaching
- ☐ Animals or property need immediate care
- ☐ None known

Tell us what is happening and any deadline or scheduled date you know.

Anything else you would like us to know?

Documents, if you have them

Death certificate; any will, trust or probate court papers; property deeds; recent account statements; and any notices that need prompt attention.

You may return this form now and provide records later.

I have answered to the best of my knowledge. I will let the firm know if any information needs to be corrected or added.

Signature

Date