

Estate Administration Questionnaire: Probate of a Will

Date Completed \_\_\_\_\_

Client Name \_\_\_\_\_

Last three digits of DL (and state) \_\_\_\_\_ Last three digits of SSN \_\_\_\_\_

Home address \_\_\_\_\_

Phone number(s) \_\_\_\_\_

E-mail address \_\_\_\_\_

Decedent's Name \_\_\_\_\_

Last three digits of Texas DL (or state ID) \_\_\_\_\_ *\*Please also provide a death certificate.*

What is your relationship to the decedent? \_\_\_\_\_

Have you ever been convicted of a felony? If so, when and where? \_\_\_\_\_

Was the decedent married at the time of death? If so, to whom? \_\_\_\_\_

Were any marriages dissolved after the date of the will? If so, please provide details. \_\_\_\_\_

Were any children born to or adopted by the decedent after the date of the will? If so, please provide details for all of the decedent's children (including names, dates of birth, and the name of the child's other parent).

## Beneficiary Information

- Please provide complete contact information for every beneficiary of the will (i.e., anyone who is entitled to receive property according to the will).

**Name** \_\_\_\_\_ **Phone** \_\_\_\_\_

Mailing Address \_\_\_\_\_

Email \_\_\_\_\_

**Name** \_\_\_\_\_ **Phone** \_\_\_\_\_

Mailing Address \_\_\_\_\_

Email \_\_\_\_\_

**Name** \_\_\_\_\_ **Phone** \_\_\_\_\_

Mailing Address \_\_\_\_\_

Email \_\_\_\_\_

**Name** \_\_\_\_\_ **Phone** \_\_\_\_\_

Mailing Address \_\_\_\_\_

Email \_\_\_\_\_

**Name** \_\_\_\_\_ **Phone** \_\_\_\_\_

Mailing Address \_\_\_\_\_

Email \_\_\_\_\_

**Name** \_\_\_\_\_ **Phone** \_\_\_\_\_

Mailing Address \_\_\_\_\_

Email \_\_\_\_\_

## Assets

- *Approximate values are sufficient at this time.*
- *Depending on the type of probate proceeding, it may be necessary to provide date-of-death account statements for all accounts that did not have a valid beneficiary designation at the time of death.*
- *Please note whether assets or accounts were jointly owned, and, if so, with whom.*

### Real Property (e.g., residence)

### Value

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

### Bank and Brokerage Accounts

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

### Retirement Accounts (e.g., IRAs, Roth IRAs, or 401(k)s)

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

### Life Insurance

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

### Other (e.g., business interests, private investments, additional items from above categories)

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

## Debts and Expenses

- Please note the amount of the debt owed at the decedent's date of death ("DOD"), as well as any amounts paid since the date of death.
- If you expect the estate to be solvent (the estate's assets will exceed all of its debts and expenses), there is no need to provide information regarding funeral expenses.

Secured Debts (e.g., mortgages, car loans, property taxes)	DOD Balance	Amt Paid
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

Medical Debts	DOD Balance	Amt Paid
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

Unsecured Debts (e.g., credit cards, other)	DOD Balance	Amt Paid
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

### Funeral Expenses (Approximate amounts are sufficient at this time.)

_____	\$ _____
_____	\$ _____