

INFORMATION FOR DECEDENT'S ESTATE

The information provided below is intended to be helpful to you in preparing for your conference, but is not required in order for the attorney to answer many of your basic questions.

DOCUMENTS TO BRING:

1. Original Will or Trust
2. Death certificate
3. Most recent bank and brokerage statements
4. Deed or Title policy for real property
5. Title to motor vehicles held in the name of Decedent
6. Recent tax returns
7. Employee benefit documentation
8. Life Insurance policies and beneficiary designations

What was your relationship to the deceased individual ("Decedent") [Spouse, Friend, Neighbor, Aunt, Uncle, Etc.]:

DECEDENT'S INFORMATION

Full Name of Decedent:

Date of Birth:

**Place of Birth
(city, county & state):**

Date of Death:

**Place of Death
(city, county & state):**

Legal residence at date of death (city, county & state):

Did Decedent leave a valid Will?

Legal Description of Property (Lot and Block Description or Attach copy of Deed/Title Policy):

Approximate Value of real and personal property owned by Decedent (i.e., cash, household furnishings/fixtures/personal effects:

DECEDENT'S SPOUSE'S INFORMATION

FIRST SPOUSE

Full Name:

Date of Marriage:

Date of Divorce :

Place of Divorce:

If termination of marriage was due to death, provide spouse's date of death.

CHILREN OF THE FIRST MARRIAGE

NAME:

Address:

Current Marital Status:

Date of Birth:

Date of Death, if applicable:

NAME:

Address:

Current Marital Status:

Date of Birth:

Date of Death, if applicable:

SECOND SPOUSE

Full Name:

Date of Marriage:

Date of Divorce :

Place of Divorce:

If termination of marriage was due to death, provide spouse's date of death.

CHILREN OF THE SECOND MARRIAGE

NAME:

Address:

Current Marital Status:

Date of Birth:

Date of Death, if applicable:

NAME:

Address:

Current Marital Status:

Date of Birth:

Date of Death, if applicable:

THIRD SPOUSE

Full Name:

Date of Marriage:

Date of Divorce :

Place of Divorce:

If termination of marriage was due to death, provide spouse's date of death.

CHILDREN OF THE THIRD MARRIAGE

NAME:

Address:

Current Marital Status:

Date of Birth:

Date of Death, if applicable:

NAME:

Address:

Current Marital Status:

Date of Birth:

Date of Death, if applicable:

INFORMATION ON DEVISEES NOT NAMED ABOVE

NAME:

Address:

Date of Birth:

Relationship:

Date of Death, if applicable:

NAME:

Address:

Date of Birth:

Relationship:

Date of Death, if applicable:

NAME:

Address:

Date of Birth:

Relationship:

Date of Death, if applicable: