

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.]: _____
 - Did you owe the Decedent money? No Yes
 - Have you ever been convicted of a felony? No Yes

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: _____ **Date of Death, if applicable:** _____

Relationship: _____

NAME: _____

Address: _____

Date of Birth: _____ **Date of Death, if applicable:** _____

Relationship: _____

NAME: _____

Address: _____

Date of Birth: _____ **Date of Death, if applicable:** _____

Relationship: _____