

Probate/Trust Administration Questionnaire

1. **Deceased:** Name _____

Date of Death _____

Alternate Names _____

Home Address

2. Trustee/Administrator Name _____

Relationship to Decedent _____

Home Address

Telephone _____

Email _____

3. **Documents:** If available, please bring copies of the following documents to our first meeting.

- All wills, trusts, or other estate planning documents. Please bring the originals if you can find them.
- Copies of all recent account statements on or near the date of death.
- Copies of any stock certificates or bonds.
- Copies of insurance declaration pages.
- Copies of other investments or contracts.
- Copies of any unpaid bills or creditor claims.
- Original Death Certificates (start with three).

4. **Beneficiary and Family List**

Please bring a list of all beneficiaries named in the will or trust and any family members who might have been omitted:

- Spouse or Former Spouse
- Living Parents
- Children (Living or Predeceased)
- Siblings
- Grandchildren
- Other Family

I will need their names, addresses, telephone numbers, relationships to the decedent, and approximate ages. A form is attached for your use.

5. **Former Spouses:**

For each former spouse, did the marriage end in the death of the spouse (what was the approximate date of death) or divorce (when and where did the divorce occur)? Please bring a copy of the settlement or judgment, if you have it.

6. **Premarital Agreements:**

Did the deceased have a premarital agreement with any present or former spouse? Please bring a copy if you have it.

7. **Advisors:**

If you have names and telephone numbers for any of the following please provide:

- Tax Professional
- Previous Attorney
- Any other Advisor you would like me to contact, if any

8. Real Estate:

Please provide a list of all real estate owned by the deceased and/or their trust.

Address

% Ownership

9. Questions:

Please take a moment to jot down any questions you may have.

Beneficiary/Family List

Please list all beneficiaries named in the will or trust and any family members who might have been omitted. If living, please provide approximate ages, phone numbers, and addresses.

1. Name _____ Alive?

Relationship to Decedent _____

Age _____

Address _____

Phone _____

2. Name _____ Alive?

Relationship to Decedent _____

Age _____

Address _____

Phone _____

3. Name _____ Alive?

Relationship to Decedent _____

Age _____

Address _____

Phone _____

4. Name _____ Alive?

Relationship to Decedent _____

Age _____

Address _____

Phone _____

5. Name _____ Alive?

Relationship to Decedent _____

Age _____

Address _____

Phone _____