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Date: \_\_\_\_\_

**CLIENT INFORMATION FOR PROBATE OR  
LEGAL ADVICE ON DECEASED PERSON**

Please PRINT the following requested information.

Your full name: \_\_\_\_\_

Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ County \_\_\_\_\_ Zip Code \_\_\_\_\_

Primary Phone: (\_\_\_\_) \_\_\_\_\_ Alternate Phone: (\_\_\_\_) \_\_\_\_\_

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

Preferred form of communication: \_\_\_ Phone \_\_\_ Email \_\_\_ Mail

How did you learn about this law office? \_\_\_\_\_

Decedent's full name: \_\_\_\_\_ Date of death \_\_\_\_/\_\_\_\_/\_\_\_\_

Relationship to you: \_\_\_\_\_ Is there a will? \_\_\_ If yes, where is the original? \_\_\_

Decedent's home address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Are you the named personal representative? \_\_\_ Yes \_\_\_ No. If yes, your SSN \_\_\_\_\_

If no, who is? \_\_\_\_\_ Are they able to serve? \_\_\_ Yes \_\_\_ No

Did Decedent have any creditors? \_\_\_ Yes \_\_\_ No

**Names of all persons attending our conference:**

Name	Relationship to Decedent
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

*We are honored to be assisting you at this difficult time.*

The next two pages contain questions that will help us determine what actions, if any, must be taken in the decedent's estate. Please complete them to the best of your ability.

Please also bring the following with you, if you have them:

- Decedent's Will
- 2 certified copies of Death Certificate (short form preferred but not necessary)
- Statements showing assets or creditors

**BENEFICIARY INFORMATION**

(Everyone named in will or trust, if applicable and if known)

NAME	RELATIONSHIP & AGE, IF UNDER 18	ADDRESS	SSN or EIN

**DECEDENT'S ASSETS**

(What the decedent owned at the time of death including homes, real property, bank accounts, investment accounts, vehicles, mobile homes, etc.)

ITEM	VALUE	LOCATION	Was there a joint owner or beneficiary? If yes, name

**CREDITORS**

Please prepare a list of all creditors of the decedent.

It may help to look at decedent's papers including bank records, billing statements, etc.

CREDITOR	ADDRESS	AMOUNT OWED

Thank you for taking the time to review and complete these forms.  
We look forward to meeting with you.