

PROBATE ADMINISTRATION QUESTIONNAIRE

STRANDBERG LAW OFFICE, P.C.

Date: _____

DECEDENT (Deceased Person):

Full Name: _____

Last Known Address: _____

Date of Death: _____

Date of Birth: _____

Social Security number: _____ - _____ - _____

United States Citizen: _____ YES _____ NO. If "NO", what country: _____

Spouse of Decedent (if applicable):

Full Name: _____

Last Known Address: _____

Date of Death (if applicable): _____

Date of Birth: _____

Social Security number: _____ - _____ - _____

Personal Representative Nominee(s) or Petitioner(s):

Full Name: _____

Address: _____

Date of Birth: _____

Phone Number: (_____) _____

Date of Birth: _____

Social Security number: _____ - _____ - _____

E-mail Address: _____

Children of Decedent:

1. Full Name _____ Social Security number _____ - _____ - _____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (_____) _____ E-mail _____

2. Full Name _____ Social Security number _____ - _____ - _____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (_____) _____ E-mail _____

3. Full Name _____ Social Security number _____ - _____ - _____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (_____) _____ E-mail _____

4. Full Name _____ Social Security number _____ - _____ - _____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (_____) _____ E-mail _____

5. Full Name _____ Social Security number _____ - _____ - _____
Address _____ Date of Birth _____
_____ Date of Death (if applicable) _____
Phone Number (_____) _____ E-mail _____

Others: (step-children, siblings, other heirs, if any)

1. Full Name _____ Social Security number _____ - _____ - _____
Address _____ Date of Birth _____

_____ Date of Death (if applicable) _____

Phone Number (_____) _____ E-mail _____

2. Full Name _____ Social Security number _____ - _____ - _____

Address _____ Date of Birth _____

_____ Date of Death (if applicable) _____

Phone Number (_____) _____ E-mail _____

3. Full Name _____ Social Security number _____ - _____ - _____

Address _____ Date of Birth _____

_____ Date of Death (if applicable) _____

Phone Number (_____) _____ E-mail _____

4. Full Name _____ Social Security number _____ - _____ - _____

Address _____ Date of Birth _____

_____ Date of Death (if applicable) _____

Phone Number (_____) _____ E-mail _____

5. Full Name _____ Social Security number _____ - _____ - _____

Address _____ Date of Birth _____

_____ Date of Death (if applicable) _____

Phone Number (_____) _____ E-mail _____

ASSETS OF DECEDENT

1. List the legal description with street address, if any, of all real property owned by decedent. Identify whether the type of property (residential, vacant land, agricultural, commercial) and give approximate value. Identify if property was owned solely, in joint tenancy or tenants-in-common and list who the other owners are. Provide copies of all deeds and leases, if possible.

2. List any mineral rights, water rights, and oil and gas rights owned by the decedent, including copies of any oil and gas leases. Please provide any information regarding annual royalty payments for last five years.

3. List all stocks and bonds owned by decedent, including copies of all stock certificates, bonds, mutual funds and other securities. State how asset is held, whether owned solely or in joint tenancy and who the joint owner is.

4. List all financial institutions and account numbers where decedent had accounts (checking, savings, money market, certificates of deposit) and provide bank statements for last two years. Identify whether the account was owned solely by the decedent, in joint tenancy (including who joint owner) or whether transfer on death (TOD) or pay on death (POD) designations exist.

5. List all individual retirement accounts, annuities, pensions, life insurance policies and names of beneficiaries. Provide most recent statement for each of these.

6. List all vehicles owned by decedent, including year, make and vehicle identification number (VIN) and whether owned individually or with a joint tenant. Please include copies of titles and approximate value.

7. Identify any coin collections, jewelry, antiques or other valuable personal items owned by decedent and give approximate values.

8. Please give a total value of all household goods and personal property owned by decedent (excluding the items listed above).

9. Identify whether decedent had a safe deposit box, its location and whether owned solely by decedent or jointly with another. Identify whether box has been opened and if so, provide a list of the contents.

10. Identify any gifts or transfers of assets made by decedent for less than full or adequate consideration within the last 60 months. Please identify the recipients, date of the gift or transfer and the value.

11. Was decedent owed money which had been earned, but not paid, by the date of death, including salary, commissions, bonuses, etc.? Identify amounts and who owes payment.

12. Had decedent been receiving payment from an agreement or contract for sale of real estate? Please provide a copy of the contract or agreement with the schedule of remaining principal amount and accrued interest due at time of decedent's death.

13. Identify any money owed to decedent by others under promissory notes, listing the individuals and the amounts.

14. Identify whether decedent possessed or owned an interest in a partnership, limited partnership, limited liability company or stock in a closely held business. Provide fair market value of ownership, copies of all partnership or operating agreements, tax returns, corporate books, and buy/sell agreements.

15. Identify whether decedent held any general powers of appointment.

16. List any pre- or post-nuptial agreements executed by the decedent, including complete copies of the agreement.

17. Identify whether decedent had created any trust(s) during his lifetime or if serving as a trustee of a trust agreement. Please provide a complete copy of the trust agreement.

18. List all debts owed by decedent or bills due at date of death, including any debt or note decedent had personally guaranteed.

ITEMS TO BRING TO YOUR INITIAL APPOINTMENT

Existing estate planning documents, including original Last Will and Testament, Trust Agreement(s) of decedent.

Death Certificate, original if possible.

Deeds to Real Property.

Disposition Expenses, including statement of funeral services, burial or cremation costs.

Copies of personal income tax returns for last three years and copies of all gift tax returns filed by decedent.

List of assets and statements of value as of date of death for all bank accounts, CD's, stocks, bonds, investment accounts, money markets, retirement and pension accounts, mineral, oil and gas rights, insurance policies and vehicles.

Deeds to real estate
