

# PROBATE WORKSHEET

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**The Law Office of  
Antoinette Bone, PLLC**

Wills & Trusts, Probate and  
Estate Administration,  
Guardianships, Asset Protection,  
Legacy Planning  
Business/Succession Planning

USING THIS ORGANIZER WILL ASSIST US IN DESIGNING AN ESTATE PLAN THAT MEETS  
YOUR GOALS.  
ALL INFORMATION PROVIDED IS STRICTLY CONFIDENTIAL.

PLEASE RETURN THE COMPLETED WORKSHEET TO OUR OFFICE 3 DAYS  
PRIOR TO YOUR APPOINTMENT VIA MAIL, EMAIL, OR FAX.

## PROBATE QUESTIONNAIRE

1. Name of Decedent: \_\_\_\_\_
2. Decedent's date of death: \_\_\_\_\_
- 3a. Decedent's date of birth: \_\_\_\_\_
- 3b. Decedent's social security number: \_\_\_\_\_
- 3c. Location and owner of any safe deposit box (and keys) in which Decedent stored property:  
\_\_\_\_\_

4. Decedent's address at date of death:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Decedent's permanent residence at date of death:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- 6a. Name and address of surviving spouse (if any):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- 6b. -List each marriage of the Decedent, how each ended (death or divorce), when each ended, and children born to, or adopted during, each marriage.

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\_\_\_\_\_

- 6c. Provide a copy of all marital (partition) agreements executed by Decedent.

6d. Provide a copy of all divorce decrees in which Decedent was a party.

7. Name and address of surviving children (if any):

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8. -Names of deceased children and dates of death (and names of surviving issue of any deceased children):

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9. If Decedent died testate (with a will):

(a) Date of Will (and codicils, if any):

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(b) Addresses and phone numbers of all named beneficiaries:

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10. If Decedent died intestate (without a will):

(a) Name and address of spouse, children, and other lineal descendants:

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(b) -If there are no lineal descendants, the name and address of parents, siblings, and other collateral relatives:

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11. List property owned by decedent at date of death:

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(a) Real estate. For each tract, provide the following:

- Copy of deed.
- Copy of most recent tax statement.
- Copies of mortgage information (if any).
- Copies of applicable leases affecting the land, including mineral leases.

(b) Personal property. Provide the following:

Bank and brokerage accounts:

- Copy of monthly statements covering the date of death.
- Copies of all signature cards or "Account Opening" agreements.

Life insurance (in which the Decedent had an ownership interest):

- Copies of policies.
- Copies of beneficiary designations.
- Contact information for beneficiaries.

Life insurance (that are payable due to Decedent's death):

- Copies of policies.
- Copies of beneficiary and ownership designations.

Stocks and bonds:

- Copies of all stocks and bonds held by Decedent in certificate form (not in a brokerage account).

Vehicles:

- Copies of all original titles.

Mortgages or Notes:

- Copies of any notes evidencing money owed to the Decedent, along with amortization schedules and documents reflecting security interests (if any).

Miscellaneous:

- Descriptions (and valuations, if any) of all other assets owned by decedent (including collections such as art, coins, stamps, dolls, etc).

Debts:

- Descriptions of all debts owed by decedent (credit cards, mortgages, etc.).

12. -Of the property listed in question 11, mark all items that were owned by Decedent prior to marriage or that were received by Decedent during the marriage by gift or inheritance.

13. Provide copies of all gift tax returns filed by Decedent or his spouse(s).

14. Provide copies of Decedent's personal income tax returns for the last three years.

15. -Provide copies of any trust agreements in which the Decedent was the settlor/grantor, trustee or beneficiary.

How did you hear about us? \_\_\_\_\_

**YOUR ADVISORS** in case we need to consult with them.

Accountant	Name	Firm	Phone
Financial Advisor	Name	Firm	Phone
Financial Advisor	Name	Firm	Phone
Financial Advisor	Name	Firm	Phone
Life Insurance Agent	Name	Firm	Phone
Attorney	Name	Firm	Phone