PROBATE QUESTIONNAIRE

LORENZO BROWN & ASSOCIATES, P.C.

NAMES AND ADDRESSES

Your name: _____

Mailing address: _____

Telephone Nos.: (Work) _____ (Home) _____
(Mobile)_____
E-Mail address:_____

Your SSN: _____

Your Drivers Licence No: _____ State _____

Your relation to the Deceased: _____

IDENTITY OF DECEASED

Full legal name of Deceased:_____

Address at time of death:_____ (Street)

_____(City/State/Zip)

Deceased's date of birth:_____

Deceased's place of birth: _____ (City/State)

Deceased's SSN: _____

Deceased's Drivers License No. _____ Sate _____

Deceased's date of death:_____

(Please provide a copy of the death certificate if available)

ESTATE PLAN

Did the Deceased have a Will(s)? □Yes □No (If yes, provide attorney with a copy)

Did the Deceased have a Trust(s)? □ Yes □ No (If yes, provide attorney with a copy)

FAMILY INFORMATION

Was the Deceased married? □ Yes □No
If *yes*, what is/was the name of the Deceased's spouse?_____
Is the Deceased*s spouse still living? □Yes □No
If *no*, when and where did the Deceased spouse die?_____

Children:

Name	Address	Date of Birth	Indicate if adopted or from a previous marriage
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Any Deceased children? □Yes □ No
If *yes*, name of Deceased child: _____
Did this Deceased child leave any children? □Yes □No
If *yes*, please name:_____

PERSONAL REPRESENTATIVE

Does the will or any other communication from the Deceased indicate who should be Personal Representative ("executor") of the Deceased's estate? (The Personal Representative is responsible for probating the will, paying debts, collecting the assets, and settling the estate.)
□Yes □No If *yes*, please provide:
Name _____
Address _____
Phone _____

INFORMATION REGARDING THE DECEASED'S ASSETS

1. Estimated net worth of estate: $ _____

2. To the extent possible, collect information and documents regarding the Deceased's accounts held at financial institutions:

3. To the extent possible, collect information and documents regarding the Deceased's investments:

☐ Cash or money fund accounts, or certificates of deposit with stock broker firms.
☐ Stocks, bonds, and mutual funds where the broker holds the certificates and sent the Deceased periodic statements showing the account balance.
☐ Mutual funds where the Deceased dealt directly with the issuing company rather than through a stock broker.
☐ Stocks and bonds (other than U.S. Savings Bonds) where the Deceased held the certificates in your possession.
☐ U.S. savings bonds.
☐ Treasury bills or other government securities.
☐ Limited partnerships.
☐ Oil and gas royalty or working interests.
☐ Oil and gas mineral rights in land.
☐ Other securities [describe]

4. Retirement plans:

☐ Individual retirement accounts (IRAs), Keogh, or other individual plans providing tax deferment for deposits and income.
☐ Employer-provided profit sharing, retirement, or other benefit plans:
If so, Name of Employer_____
Contact person _____
Last year worked: _____

5. Real estate:

☐ Personal residence located in state of
☐ Other property. How many different parcels of real estate did the Deceased own, other than his/her personal residence?_____
In what state(s) are these parcels located?_____
Was the Deceased purchasing any of the above properties on a contract for deed?
☐Yes ☐ No. If yes, provide details: _____

6. Complete this section if the Deceased was engaged in business.
Did the Deceased own a business, or was he/she a partner in a business?
☐Yes ☐No
If yes, complete the following:

□Business is organized as a corporation. How many corporations? _____
How many corporations are subchapter S corporations? _____

☐ Business is organized as a partnership. How many partnerships? _____

☐ Business is a sole proprietorship. How many different firms? _____

7. Receivables

If any money is owed to the Deceased, as payments on contracts, where the Deceased sold a business, as payments on obligations secured by real estate, or where the Deceased loaned money to someone and held a note, indicate each type of indebtedness:

☐ Promissory note(s) secured by real estate. Amount(s) owed: _____

☐ Installment contract(s) of sale of personal property. Amount(s) owed: _____

☐ Unsecured promissory note(s). Amount(s) owed: _____

8. Life Insurance Policies

For life insurance policies insuring the Deceased, indicate the name of the insurance company, the face amount of the policy, and the type of policy.

Insurance Company	Face Amount	Type of Policy
_____	_____	_____
_____	_____	_____
_____	_____	_____

9. Personal property other than automobiles, trucks, boats, and trailers:

□ Household furniture and appliances
□ Collections, art, antiques, valuable jewelry
□Automobiles
□Boats
□Recreational vehicles
□Motor home
□Business machinery and equipment
□Personal equipment and tools
□Farm or ranch machinery and equipment (other than general tools)
□Livestock

Retainer (Guarantee of Payment)
We will require an initial retainer in the amount of $_____ to be held in our client retainer account as a guarantee of payment on all outstanding balances owed by you to our firm.