

Estate Planning & Probate Questionnaires

Prepared for Lisa K. Crawford, Esq., PLLC

1. Probate Administration Questionnaire

Section A – Contact Information (Person Completing Form)

Name:

Address:

Email:

Phone:

Relationship to Decedent:

Section B – Decedent's Information

Full Name:

Last Residence Address:

County of Residence:

Date of Birth:

Date of Death:

Section C – Estate Overview

Did the decedent leave a Will? Yes No Unsure

Did the decedent have a Trust? Yes No Unsure

Assets at Death (check all that apply):

Real estate (house/land)

Bank accounts

Investment accounts (stocks, bonds, etc.)

Retirement accounts (401k, IRA, pensions)

Vehicles

Life insurance policies

Business ownership

Other: _____

Liabilities at Death (check all that apply):

Mortgage or loans

Credit card debt

Medical bills outstanding

Other debts: _____

Approximate Value of Estate (\$):

Section D – Family & Heirs

Was the decedent married at time of death? Yes No

Surviving spouse's name (if any):

List children, grandchildren, or other heirs:

Marriage Section

Spouse's Full Name:

Date of Marriage:

Place of Marriage:

Was the marriage dissolved before death? Yes No