

THE HERITAGE LAW GROUP
Susan I. Jean & Associates, PC

ESTATE ADMINISTRATION QUESTIONS

Documents to bring with you, if applicable:

- Decedent's Will
- Decedent's trust
- Decedent's death certificate
- Any court docs regarding Will or Executor
- Any filing with the Commissioner of Accounts
- Deeds to decedent's real estate
- Most recent statements from financial accounts

Your name: _____

Address: _____

Email: _____

Cell Phone: _____ Home Phone: _____

Decedent: _____

Last address: _____

Your relationship: _____

Date of birth: _____ Date of death: _____

Decedent's Family and Beneficiaries. *List the decedent's spouse, children, and other people named in the Decedent's Will. If no spouse or children, please include Decedent's closest living relatives, i.e. grandchildren, parents, or siblings. Attach additional pages if necessary.*

Name: _____ Deceased

Relationship: _____ Phone: _____

Address: _____

Name: _____ Deceased

Relationship: _____ Phone: _____

Address: _____

Name: _____ Deceased

Relationship: _____ Phone: _____

Address: _____

Name: _____ Deceased

Relationship: _____ Phone: _____

Address: _____

How did you hear about us? _____

If you were referred by an individual, may we thank him or her? Yes No

*** It is critical to know if accounts have joint owners and/or beneficiary designations. You should make every effort to figure this out before our appointment. Otherwise, the appointment will not be very productive. ***

Decedent's Name:

All values should be as of date of death

Name of Financial Institution and account	Solely in Decedent's Name	Joint with Survivorship	If jointly owned, who is the joint owner? or Named beneficiary / ToD / PoD
Checking, Saving, Money Market, Accounts, CDs			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Stocks & Bonds, Brokerage Acc'ts, Mutual Funds, Investments			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Tax-qualified accounts (IRAs, 401(k)s, tax-qualified annuities, etc.)			
	\$	n/a	
	\$	n/a	
	\$	n/a	
	\$	n/a	
Real Estate (estimate fair market value - you can note mortgages under "debt")			
	\$	\$	
	\$	\$	
	\$	\$	

Name of Financial Institution and account	Solely in Decedent's Name	Joint with Survivorship	If jointly owned, who is the joint owner? or Named beneficiary / ToD / PoD
Life insurance - death benefit values			
	\$	n/a	
	\$	n/a	
	\$	n/a	
	\$	n/a	
Vehicles, boats, items of unusual value, etc.			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Business interests, other misc. assets			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Totals	\$	\$	

Debts Owed	Amount owed	Notes
	\$	
	\$	
	\$	
	\$	
	\$	