

PROBATE QUESTIONNAIRE

Client's Information

Name
Address
Phone(s)

Deceased's Information

Social Security Number
Name
Birthdate
Date of Death
Age at Death
Marriage date(s), Divorce date(s)
Spouse's who have died (dates of death)

Decedent's Heirs

Name
Address
Relationship
Phone Numbers
Children's Names, Birthdates

Community Property

Real Property (include legal description)
Values

Separate Property

Real Property (include legal description)
Values
Financial Institutions names, addresses, account types and numbers, type of accounts

Fact Witnesses (2) Who Can Testify About the Deceased

Names
Addresses
Dates