

ESTATE PROBATE WORKSHEET

NAME OF DECEDENT: _____

ADDRESS OF DECEDENT: _____

SOCIAL SECURITY #: _____

DATE OF BIRTH: _____

DATE OF DEATH: _____

NAME OF SPOUSE: _____

SPOUSE'S SOC SEC #: _____

DID DECEDENT HAVE A TRUST FUND? YES / NO

DID DECEDENT MAKE A GIFT WITHIN 1 YEAR OF DEATH? YES / NO

IF SO, SET FORTH DATE OF GIFT(S); AMOUNT OF GIFT; NAME OF DONEE, ADDRESS, AND RELATIONSHIP TO DECEDENT.

DID DECEDENT HAVE ANY RETIREMENT PLANS, IRA's, 401(k)'s, SAVING'S PLANS OR ANY TYPE OF PLAN? YES / NO

IF SO, SET FORTH NAME OF PLAN(S); ACCOUNT #; VALUE ON DATE OF DEATH, AND NAME, ADDRESS OF BENEFICIARY AND RELATIONSHIP TO DECEDENT.

DID THE DECEDENT OWN AN ANNUITY ON DATE OF DEATH? YES / NO

IF SO, SET FORTH NAME OF COMPANY; ACCOUNT #; DATE OF DEATH VALUE; NAME, ADDRESS OF BENEFICIARY AND RELATIONSHIP TO DECEDENT.

DID THE DECEDENT HAVE ANY BANK ACCOUNTS IN THEIR OWN NAME? YES / NO

IF SO, IDENTIFY BANK, ACCOUNT #, DATE OF DEATH BALANCE. WERE ANY CHECKS WRITTEN PRIOR TO DEATH THAT CLEARED AFTER DEATH? IF SO, IDENTIFY PAYEE, PURPOSE OF PAYMENT, AND AMOUNT.

DID ANY OF THE ABOVE DESCRIBED ACCOUNTS HAVE A "PAY ON DEATH" (POD), "TRANSFER ON DEATH" (TOD), OR "IN TRUST FOR" (ITF) DESIGNATION? YES / NO

IF SO, IDENTIFY ACCOUNT, AND NAME AND ADDRESS OF BENEFICIARY OF ACCOUNT. SET FORTH THEIR RELATIONSHIP TO DECEDENT. WERE ANY CHECKS WRITTEN PRIOR TO DEATH THAT CLEARED AFTER DEATH? IF SO, IDENTIFY PAYEE, PURPOSE OF PAYMENT, AND AMOUNT.

DID DECEDENT HAVE ANY BANK ACCOUNTS IN JOINT NAMES WITH OTHERS? YES / NO

IF SO, IDENTIFY BANK, ACCOUNT #, DATE OF DEATH BALANCE. SET FORTH THE DATE SUCH ACCOUNT WAS MADE JOINT. WERE ANY CHECKS WRITTEN PRIOR TO DEATH THAT CLEARED AFTER DEATH? IF SO, IDENTIFY PAYEE, PURPOSE OF PAYMENT, AND AMOUNT.

DID DECEDENT OWN ANY REAL ESTATE? YES / NO

IF SO, SET FORTH ADDRESS, LOT & BLOCK # (IF KNOWN), AND ESTIMATED VALUE. SET FORTH NAME AND ADDRESS OF ANY CO-OWNERS.

DID DECEDENT OWN ANY STOCKS IN PUBLICLY TRADED COMPANIES? YES / NO

IF SO, SET FORTH THE NAME OF SUCH HOLDING(S), THE SYMBOL (IF KNOWN), AND THE AMOUNT OF SHARES. INDICATE WHETHER SUCH STOCK HAD A "TOD" OR "POD" DESIGNATION. IF SO, IDENTIFY PAYEE, ADDRESS, AND DESCRIBE RELATIONSHIP TO DECEDENT. SET FORTH NAME AND ADDRESS OF ANY CO-OWNERS.

DID DECEDENT OWN ANY US SAVINGS BONDS IN THEIR OWN NAME AT TIME OF DEATH? YES / NO

IF SO, SET FORTH TYPE OF BOND, AMOUNT OF BOND, ID # OF BOND AND DATE OF ISSUANCE. INDICATE WHETHER SUCH STOCK HAD A "TOD" OR "POD" DESIGNATION. IF SO, IDENTIFY PAYEE, ADDRESS, AND DESCRIBE RELATIONSHIP TO DECEDENT.

DID DECEDENT OWN ANY US SAVINGS BONDS IN IN JOINT NAMES WITH OTHERS AT TIME OF DEATH? YES / NO

IF SO, SET FORTH TYPE OF BOND, AMOUNT OF BOND, ID # OF BOND AND DATE OF ISSUANCE.

DID DECEDENT OWN ANY SMALL BUSINESS AT TIME OF DEATH? YES / NO

IF SO, SET FORTH NAME AND ADDRESS OF SUCH BUSINESS. PROVIDE ANY APPRAISAL DONE WITHIN 2 YEARS. PROVIDE COPIES OF IRS RETURNS FOR MOST RECENT 3 YEARS. IDENTIFY NAMES AND ADDRESSES OF CO-OWNERS AND SET FORTH DECEDENT'S % OF OWNERSHIP. SET FORTH LEGAL FORM OF SUCH BUSINESS.

DID ANYONE OWE DECEDENT MONEY AT TIME OF DEATH? YES / NO

IF SO, IDENTIFY NAME AND ADDRESS OF OBLIGOR AND SET FORTH THE AMOUNT DUE ON DATE OF DEATH. SET FORTH NAME AND ADDRESS OF ANY CO-OWNERS OF SUCH OBLIGATION.

DID DECEDENT OWN PERSONAL PROPERTY HAVING VALUE ON DATE OF DEATH? YES / NO

IF SO, PLEASE DESCRIBE. PROVIDE EVIDENCE OF VALUE, IF ANY. SET FORTH NAME AND ADDRESS OF ANY CO-OWNERS OF SUCH PERSONALTY. DO NOT INCLUDE ANY PERSONALTY CO-OWNED BY SPOUSE.

DID DECEDENT OWN ANY CARS, TRUCKS, BOATS, OR TRAILERS AT TIME OF DEATH? YES / NO

IF SO, ATTACH COPY(S) OF ALL TITLES AND SET FORTH MILES ON ANY CARS/TRUCKS AND STATE WHETHER VEHICLE IN EXCELLENT, VERY GOOD, GOOD, AVERAGE, POOR OR VERY POOR CONDITION. INDICATE WHETHER TITLE IS IN JOINT NAMES AND SET FORTH NAME AND ADDRESS OF ANY CO-OWNERS.

ARE ANY ASSETS OWNED BY DECEDENT HELD JOINTLY WITH OTHERS "WROS" or "WITH RIGHT OF SURVIVORSHIP"? YES / NO

IF SO, IDENTIFY SUCH ASSET AND SET FORTH NAME(S) AND ADDRESS OF SUCH CO-OWNERS.

DEBTS AND EXPENSES

WHAT DEBTS HAVE BEEN PAID FOLLOWING DEATH OR ARE DUE WHICH DID NOT RESULT FROM DECEDENT'S DEATH? SET FORTH THE CREDITOR, THE PURPOSE OF THE DEBT AND THE AMOUNT.

WHAT DEBTS HAVE BEEN PAID OR ARE DUE WHICH AROSE DUE TO DEATH OR THE ADMINISTRATION OF THE ESTATE? (FUNERAL, WAKE, FLOWERS, EXECUTOR'S TRAVEL, REAL ESTATE MAINTENANCE, INSURANCE, ETC)

SET FORTH NAME, ADDRESS AND RELATIONSHIP OF EACH BENEFICIARY.

WAS THE DECEDENT A BENEFICIARY OF ANY TRUST AT TIME OF DEATH? YES / NO

IF SO, PLEASE DESCRIBE.

IS THERE ANY ASSET, DEBT OR OTHER ISSUE YOU BELIEVE NEEDS ADDRESSED WHICH DOES NOT APPEAR IN YOUR REPLIES TO THE REQUESTS IN THIS DOCUMENT? YES / NO

IF SO, PLEASE DESCRIBE.