



**FULLERTON, LEMANN, SCHAEFER & DOMINICK, LLP**

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## PROBATE QUESTIONNAIRE

### Your Information

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone # \_\_\_\_\_ Home / \_\_\_\_\_ Cell  
\_\_\_\_\_ Business / Fax # \_\_\_\_\_

E-Mail \_\_\_\_\_

Social Security # \_\_\_\_\_ Driver's License # \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Relationship to Decedent: \_\_\_\_\_

Who Referred You to Us: \_\_\_\_\_

### Decedent's Information

Name: \_\_\_\_\_

Alias Names: \_\_\_\_\_

Address at Death: \_\_\_\_\_

Date of Death: \_\_\_\_\_ Place of Death: \_\_\_\_\_

Social Security # \_\_\_\_\_

Decedent's Accountant: \_\_\_\_\_

**Will Information**

Did Decedent have a will? (Circle)      Yes      No

If so, was there a codicil? (Circle)      Yes      No

Witnesses Names / Address:      1.      \_\_\_\_\_

\_\_\_\_\_

2.      \_\_\_\_\_

\_\_\_\_\_

Executor's Names / Address:      1.      \_\_\_\_\_

\_\_\_\_\_

2.      \_\_\_\_\_

\_\_\_\_\_

**Decedent's Surviving Relatives:**

Spouse:      Name: \_\_\_\_\_

Address: \_\_\_\_\_

If no Spouse: (Circle One)      Divorced      Never Married      Spouse Deceased

Natural Children:      Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Adopted Children: Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Step-Children: Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Pre-Deceased Children: (Circle) Yes No

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

(Complete only if no Surviving Children)

Grandchildren: Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

**Decedent's Assets:**

Residence: \_\_\_\_\_

\_\_\_\_\_

Other real property: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Bank Accounts: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Investment Accounts: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Stocks / Securities: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Bonds: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Business Interests: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Partnerships: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Notes Receivable: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Insurance Policies: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Annuities: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Vehicles: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Boats: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other Assets: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Decedent's Debts:**

Mortgage: \_\_\_\_\_  
\_\_\_\_\_

Income Taxes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Loans / Credit Cards: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other Debts: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_