

**ESTATE PROBATE INTAKE FORM**

**CLIENT**

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

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

Phone: \_\_\_\_\_

**DECEDENT**

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

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

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

**DID DECEDENT HAVE A WILL: Y N (ATTACH COPY)**

**WAS DECEDENT MARRIED? Y N**

Spouse's Name: \_\_\_\_\_

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

**BENEFICIARIES:**

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

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

Minor ? Y N

Relation: \_\_\_\_\_  
\_\_\_\_\_

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

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

Minor ? Y N

Relation: \_\_\_\_\_  
\_\_\_\_\_

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

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

Minor ? Y N

Relation: \_\_\_\_\_

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

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

Minor ? Y N

Relation: \_\_\_\_\_

**Who is appointed to serve as Executor/Administrator? \_\_\_\_\_**

**Does proposed Executor owe any money to the Decedent? Y N**

**REAL PROPERTY:**

Did Decedent own real estate? Y N

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

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

Value: \_\_\_\_\_

Value: \_\_\_\_\_

Joint rights of survivorship? Y N

Joint rights of survivorship? Y N

**ACCOUNTS:**

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

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

Type of Account: \_\_\_\_\_

Type of Account: \_\_\_\_\_

Value: \_\_\_\_\_

Value: \_\_\_\_\_

Joint rights of survivorship? Y N

Joint rights of survivorship? Y N

Payable on Death: Y N

Payable on Death: Y N

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

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

Type of Account: \_\_\_\_\_

Type of Account: \_\_\_\_\_

Value: \_\_\_\_\_

Value: \_\_\_\_\_

Joint rights of survivorship? Y N

Joint rights of survivorship? Y N

Payable on Death: Y N

Payable on Death: Y N

**PERSONAL PROPERTY:**

Item: \_\_\_\_\_

Value: \_\_\_\_\_

Item: \_\_\_\_\_

Value: \_\_\_\_\_

Item: \_\_\_\_\_

Value: \_\_\_\_\_

Item: \_\_\_\_\_

Value: \_\_\_\_\_

Item: \_\_\_\_\_

Value: \_\_\_\_\_

Item: \_\_\_\_\_

Value: \_\_\_\_\_

Item: \_\_\_\_\_

Value: \_\_\_\_\_

Item: \_\_\_\_\_

Value: \_\_\_\_\_

Vin #: \_\_\_\_\_

Vin #: \_\_\_\_\_

Vin #: \_\_\_\_\_

Vin #: \_\_\_\_\_

**COSTS:**

Funeral cost: \_\_\_\_\_

Paid by: \_\_\_\_\_

Court Costs: \_\_\_\_\_

Paid by: \_\_\_\_\_

Debtor: \_\_\_\_\_

Debtor: \_\_\_\_\_

Amount: \_\_\_\_\_

Amount: \_\_\_\_\_

Paid by: \_\_\_\_\_

Paid by: \_\_\_\_\_

Debtor: \_\_\_\_\_

Debtor: \_\_\_\_\_

Amount: \_\_\_\_\_

Amount: \_\_\_\_\_

Paid by: \_\_\_\_\_

Paid by: \_\_\_\_\_

**NOTES:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

