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Probate Client Intake Form

If you are a responsible family member of a deceased person who died without a will or have been named as the "executor" or "personal representative" in a deceased person's will, it is advisable that you seek the counsel of an experienced probate lawyer to help you through the probate process. In order to do the best possible job, your attorney needs information about the deceased, the deceased's estate plan, and the deceased's assets and liabilities. At your first meeting with your attorney, you should be prepared to provide, as applicable, the following information:

NAMES AND ADDRESSES

Your Name(s): _____

Mailing Address: _____

Work: _____ Home: _____ Cell: (Mobile) _____

Date of Birth: _____ Social Security#: _____

Driver's License: _____ State: _____ Expires: _____

Emergency Contact: _____

Phone: _____

E-mail Address: _____

Your Relation to the Deceased: _____

IDENTITY OF DECEASED

Name of Deceased: _____

Deceased Date of Death: _____

Deceased's Date of Birth: _____

Deceased's Social Security Number: _____

ESTATE PLAN

Did the Deceased have an existing Will(s)? Yes No

(If yes, provide your attorney with a copy)



Did the Deceased have an existing Trust(s)? Yes No

(If yes, provide your attorney with a copy)

FAMILY INFORMATION

Was the Deceased married? Yes No If yes, what is/was the name of the Deceased's spouse?

Is the Deceased's spouse still living? Yes No If no, when and where did the deceased spouse die?

Deceased's Children:

Indicate Whether Adopted or from a Previous Marriage	Name	Birth Date
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Have any children received an advance on their inheritance or are any children financially indebted to the deceased? Yes No

Any deceased children? Yes No

If Yes, Name of Deceased Child: _____

Did this deceased child leave any children? Yes No

Name of Deceased Child: _____

Did this deceased child leave any children? Yes No



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Deceased's Grandchildren, if any:

Name Date of Birth Parents

Four horizontal lines for entering grandchild information.

Other Pertinent Family Information or Explanation of Above Items:

Three horizontal lines for providing family information.

PERSONAL REPRESENTATIVE

Does the will or any other communication from the Deceased indicate who should be Personal Representative ("executor") of the Deceased's estate? (The Personal Representative is responsible for probating the will, paying debts, collecting the assets, and settling the estate.)

Yes No If so, who?

Horizontal line for providing name if applicable.

SAFE DEPOSIT BOX

Did the Deceased have a safe deposit box?

Yes No If so, where? _____

Does anyone else have access to the box? Provide name(s):

Horizontal line for providing names of others with access.

PROFESSIONALS

Did the Deceased have an attorney? Yes No

If Yes to the above, please give name and address:

Two horizontal lines for providing attorney name and address.



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Did the Deceased have an accountant? Yes No If Yes to the above, please give name and address:

Did the deceased have a financial planner, investment advisor or insurance agent? Yes No
If Yes to the above, please give name and address:

INFORMATION REGARDING THE DECEASED'S ASSETS

1. Estimated net worth of estate: \$ _____

2. To the extent possible, collect information and documents regarding the Deceased's accounts

held at financial institutions:

3. To the extent possible, collect information and documents regarding the Deceased's investments:

Cash or money fund accounts, or certificates of deposit with stock broker firms.

Stocks, bonds, and mutual funds where the broker holds the certificates and sent the Deceased periodic statements showing the account balance.

Mutual funds where the Deceased dealt directly with the issuing company rather than through a stock broker.

Stocks and bonds (other than U.S. Savings Bonds) where the deceased held the certificates in your possession.

U. S. savings bonds.

Treasury bills or other government securities.

Limited partnerships.

Oil and gas royalty or working interests.

Oil and gas mineral rights in land. Other securities



[describe]_____

4. Retirement plans:

Individual retirement accounts (IRAs), Keogh, or other individual plans providing tax deferral for deposits and income.

Employer-provided profit sharing, retirement, or other benefit plans:

5. Real estate:

Personal residence located in state of _____

Mortgage Balance _____

Other property. How many different parcels of real estate did the Deceased own, other than his/her personal residence? _____

In what state(s) are these parcels located? _____

Was the Deceased purchasing any of the above properties on a contract for deed? Yes No.

If Yes, provide details: (Mortgage Balance; Rental Income , etc.)

6. Business Ownership: Complete this section if the deceased was engaged in business.

Do you own a business, or are you a partner in a business? Yes No

If Yes, complete the following:

Business is organized as a corporation. How many corporations? _____

How many corporations are subchapter S corporations? _____

Business is organized as a partnership. How many partnerships? _____

Business is a sole proprietorship. How many different firms? _____

7. Receivables: If any money is owed to the Deceased, as payments on contracts, where the Deceased sold a business, as payments on obligations secured by real estate, or where the Deceased loaned money to someone and held a note, indicate each type of indebtedness:

Promissory note(s) secured by real estate. Amount(s) owed: _____

Installment contract(s) of sale of personal property. Amount(s) owed: _____



Unsecured promissory note(s). Amount(s) owed: _____

8. Life Insurance Policies: For life insurance policies insuring the Deceased, indicate the name of the insurance company, the face amount of the policy, and the type of policy.

Type Company	Name Face	Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

9. Annuities: Please indicate the name of the annuitant and the type of annuity. Do not list annuities under which no benefits are payable after the death of the annuitant.

Regular annuities payable for guaranteed minimum term or amount:

Tax-deferred annuities:



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10. Personal property other than automobiles, trucks, boats, and trailers:

Household furniture and appliances Collections, art, antiques, valuable jewelry
Automobiles Boats Recreational vehicles Motor home Business machinery and
equipment Personal equipment and tools Farm or ranch machinery and equipment (other
than general tools) Livestock

LIABILITIES

(Make a list of known liabilities or debts of the deceased.)

QUESTIONS

(Make a list of pertinent questions to ask your attorney.)