

I will be pleased to discuss your concerns that deal with the estate of a deceased person.

Settling an estate often can be complex. A complete financial investigation will be essential. You and I should discuss the nature of an estate proceeding, the various steps that need to be completed, your role in the procedures, the involvement of other consultants or professionals, court, tax authority and other government requirements, and other factors that affect the process.

I will need to learn about the estate's property, some background on you and on the deceased person, what special concerns you may have, and other details. In order to help you start getting this information organized, please use the following questionnaire. Please complete as much of it as you can, and gather together the documents it calls for, before we meet.

Please send me the questionnaire when your answers are complete, with copies of the supplemental documents it asks for. When I get your information, I will contact you promptly to schedule a meeting. I will review this information carefully with you when we meet.

If you have any questions before we meet, please call me.

Several factors affect the amount and nature of a fee for assisting you in the settlement of the estate. I will discuss my fees with you, during our first consultation.

ESTATE SETTLEMENT QUESTIONNAIRE
- Getting Started -

QUESTIONS ABOUT YOU: Please give me your name the way you customarily sign documents:

_____ And address:

Tel.: (_____) _____

Your country of citizenship: _____ And any other addresses you use:

Your Social Security Number: _____

What is your relationship or association with the deceased person? _____

QUESTIONS ABOUT THE DECEASED PERSON:

Full name: _____ PLEASE ALSO LIST **ANY OTHER NAMES** THE DECEASED PERSON EVER USED:

Usual way of signing documents: _____ Social Security Number: _____

Mailing address and, if different, the actual address of the residence:

Place and Date of Birth: _____

Place and Date of Death: _____

Do you have the Death Certificate? _____ [Please bring all copies with you]

Has there been a funeral? _____ Burial? _____ Are they Paid For? _____ If so,

By Whom? _____ And How Much? _____

[Please bring the bill(s) and receipt(s)]

Country of citizenship: _____

[Please locate Birth Certificate, Passport or other proof of age and citizenship if available]

QUESTIONS ABOUT NEXT-OF-KIN OF THE DECEASED PERSON:

For all questions, include persons related by half-blood, by step relationship, and by adoption; also include any person adopted out, if known.

Surviving Spouse, if any: _____ Social Security No.: _____

ADDRESS:

Former Spouse(s), if any; Date of Birth; Social Security No.; Current Address/Date of Death:

Child(ren), if any; Address / Date of Death:

(Great)Grandchild(ren), if any; Address / Date of Death; Parents of (Great)Grandchild:

Decedent's Siblings; Address / Date of Death
Include half- and step- siblings [USE ADDITIONAL SHEETS IF NEEDED]

Children of Decedent's Siblings; Address / Date Death
[USE ADDITIONAL SHEETS IF NEEDED]

Mother's Name; Address / Date of Death

Father's Name; Address / Date of Death

Mother's Siblings; Address / Date of Death
[USE ADDITIONAL SHEETS IF NEEDED]

Father's Siblings; Address / Date of Death
[USE ADDITIONAL SHEETS IF NEEDED]

Children of Mother's Siblings; Address / Date of Death
Include half- and step- siblings [USE ADDITIONAL SHEETS IF NEEDED]

Children of Father's Siblings; Address / Date of Death
Include half- and step- siblings [USE ADDITIONAL SHEETS IF NEEDED]

Mother's Mother; Address / Date of Death

Father's Mother; Address / Date of Death

Mother's Father; Address / Date of Death

Father's Father; Address / Date of Death

Other Survivors; Address; Relationship
[USE ADDITIONAL SHEETS IF NEEDED]

QUESTIONS ABOUT THE PROPERTY OF THE DECEASED PERSON

PLEASE ANSWER TO THE EXTENT OF AVAILABLE INFORMATION. INCLUDE ALL PROPERTY THE DECEASED PERSON HAD AN INTEREST IN, **EVEN IF OWNED JOINTLY.**

STATE THE **SOURCE OF YOUR INFORMATION** ABOUT THE VALUE OF ITEMS. IF YOU DO NOT KNOW THE EXACT VALUE OF AN ITEM, STATE YOUR MOST ACCURATE ESTIMATE.

1. Is there a will? _____ Are there questions about more than one will? _____
Please **bring** the original or a copy of the will, if any, and of any former will that is in question.

2. Who receives gifts under the will? [Also note **any property mentioned in the will which cannot be found.**]
Name Age Current Address Property Given in the Will

3. List All Business Interests and their Value; State whether Owned, Partly Owned & With Whom, or Operated Without Ownership Interest. Bring with you all **documents** relating to the establishment of or operating authority for any partnership, corporation or other business entity, and documentation on current value of the business.

4. List All Accounts with any Stock, Bond or Other Investment Broker; Give **Name of Firm, Name & Number Identifying Account, and Current Value.** Bring with you all **documentation** about the establishment of the account and its current value. Include joint and "pay on death" or "in trust for" accounts.

Firm Account Number Value

5. List All Accounts with any Bank, Savings Institution, Credit Union or Other Financial Institution; Give **Name of Institution, Name & Number Identifying Account, and Current Value.** Bring with you all **documentation** about the current value of the account. Include joint and "pay on death" or "in trust for" accounts.

Institution Account Number Value

6. List all Motor Vehicles; State the Selling Price or Value for each

7. Give the Address or other Location of Land (Including the Home); State the Selling Price or Value for Each Parcel; State the Nature of any Income-Producing Use of the Land:
[Bring the **deed** or a complete **copy** of the deed for each parcel; bring **any lease** or other agreement affecting the land.]
8. List any Life Insurance on the Decedent's Life; State the Name and Address of the Insurance Company, the Amount of the Policy, the Name(s) and Address(es) of the Beneficiary(ies):
[Bring a **copy of the policy and any correspondence** with the company]
9. List any Annuities; State the Name and Address of the Payor of the Annuity, The Name(s) and Address(es) of any Beneficiary(ies), Annuitants, Co-Owners, the Amount of Principal, Whether in Payout, the Name(s) and Adresse(s) of any Payee(s), and Payment Amount:
[Bring a **copy of the annuity policy and any correspondence** with the company]
10. List Heirlooms, Other Tangible Items of Significant Value; State Location and Value of Each:
11. Value of remaining personal (*i.e.*, other than land) property:
12. List any Debts or Claims that you know of at this point (it may be many weeks before all debts are known):
- | Name & Address of Creditor | Amount of Debt | Purpose of Debt, if known |
|----------------------------|----------------|---------------------------|
| | | |
13. Please note any questions or special concerns you have: