



Probate Administration General Information

Please attach additional sheets as needed for additional information or to complete a question below if space is inadequate to fully answer. Please indicate the item number for which the information is being entered on any additional sheets attached. If you need assistance in answering any of the questions, please contact Gayle Carson at 310.540.0879 or gayle@smartprobatelaw.com

Client name _____

Client address _____

Client phone(s)

Home _____ Work _____ Cell _____

Client email _____

1. Decedent's name _____

2. Decedent's residence address _____

3. Decedent's marital status

Spouse's name and address _____

Spouse's deceased, date _____

Divorced or never married

Registered domestic partner name and address _____

4. Names, addresses and ages of decedent's children

a) _____

b) _____

c) _____

5. Have any children predeceased decedent? Yes or No

Name of predeceased child, and names and addresses of the children of such predeceased child

a) _____

b) _____

c) _____

6 If decedent had no children, list name, address, relationship and age of:

a) Surviving parent(s) _____

b) Surviving sister(s)/brother(s) (or children of predeceased siblings) _____

c) If none of the above survived decedent, next of kin _____

7. Did decedent have any stepchildren or adopted children? Yes or No

List names, addresses, relationships and ages

8. Name(s) and address(es) of executors named in the Will

9. Name(s) and address(es) of beneficiaries named in the Will

10. Name(s) and address(es) of beneficiaries named in any trust into which probate assets will be added

Assets of the Decedent

Personal Property (describe)	Estimated Value
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Annual Gross Income

Personal Property _____ Real Property _____

Estimated market value of real property _____

Encumbrance(s) on real property _____

Will real property be sold or transferred to beneficiaries? Yes or No

Please describe _____

Documents to be returned with questionnaire

- a) Original Last Will and Testament
- b) Codicils to Last Will and Testament
- c) Certified death certificate
- d) Copy of any trust agreement into which probate assets will be transferred