

**CONFIDENTIAL QUESTIONNAIRE FOR  
INFORMATION NEEDED FOR DEALING WITH THE ESTATE OF A DECEDENT**

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**ESTATE OF**

\_\_\_\_\_

**Personal Information**

1. Full Name: \_\_\_\_\_
2. Residential Address at Time of Death: \_\_\_\_\_
3. Living at Residential Address Since: \_\_\_\_\_
4. Date of Death: \_\_\_\_\_ Place of Death: \_\_\_\_\_
5. Date of Birth: \_\_\_\_\_ Social Security #: \_\_\_\_\_
6. Marital Status @ Time of Death
  - Married – Name and Address of Surviving Spouse: \_\_\_\_\_
  - Widowed – Name and Date of Death of Spouse: \_\_\_\_\_
  - Divorced – Name of Ex-Spouse & Date Divorce Decree Became Final: \_\_\_\_\_
  - Single

You should be prepared to provide this office with two (2) or more certified copies of the decedent's Death Certificate.

**Assets** (List all assets which the decedent either owned individually or jointly with another person. All values should be as of the date of death.)

**7. Real Estate**

- A. Address:** \_\_\_\_\_
- Purchase Price: \_\_\_\_\_ Purchase Date: \_\_\_\_\_
- Mortgage Balance: \_\_\_\_\_ Mortgage Holder: \_\_\_\_\_
- Fair Market Value: \_\_\_\_\_ How Is The Property Held?: \_\_\_\_\_
- Costs of Improvements Made to Property (Provide copies of receipts): \_\_\_\_\_ Was the Property Appraised? (if yes, provide copy of appraisal) \_\_\_\_\_
- B. Address:** \_\_\_\_\_
- Purchase Price: \_\_\_\_\_ Purchase Date: \_\_\_\_\_
- Mortgage Balance: \_\_\_\_\_ Mortgage Holder: \_\_\_\_\_
- Fair Market Value: \_\_\_\_\_ How Is The Property Held?: \_\_\_\_\_

Costs of Improvements Made to Property (Provide copies of receipts): \_\_\_\_\_

Was the Property Appraised? (If yes, provide copy of appraisal) \_\_\_\_\_

C. Address: \_\_\_\_\_

Purchase Price: \_\_\_\_\_ Purchase Date: \_\_\_\_\_

Mortgage Balance: \_\_\_\_\_ Mortgage Holder: \_\_\_\_\_

Fair Market Value: \_\_\_\_\_ How Is The Property Held?: \_\_\_\_\_

Costs of Improvements Made to Property (Provide copies of receipts): \_\_\_\_\_

Was the Property Appraised? (If yes, provide copy of appraisal) \_\_\_\_\_

**8. Bank Accounts**

Name of Bank	Type of Account	Account Number	In Whose Name	Value
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Were there any outstanding/uncashed checks?  Yes  No If yes, provide details.

Were there any undeposited checks?  Yes  No If yes, provide details.

Have any checks been received since the date of death?  Yes  No If yes, provide details.

**9. Stocks and Bonds**

Type Of Stock Or Bond	# of Shares	In Whose Name	Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**10. Business Interests**

Type Of Business Interest	In Whose Name	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____

**11. Intangible Personal Property (Patents, Copyrights, Trademarks, Royalties, etc.)**

Type Of Property	In Whose Name	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____

**12. Personal Property Over \$250.00 (Silver, Collections, Furniture, Jewelry, Art, Livestock, Automobiles, Furs, etc. Any item with a value of over \$3,000.00 may need to be appraised.)**

Type Of Property	In Whose Name	Value
_____	_____	_____


**13. Miscellaneous Personal Property**

Estimate the total value of all personal property where not listed in Item 12. \_\_\_\_\_

**14. Money Owed To The Decedent**

Reason The Money Is Owed	Debtor	Amount Owed

**15. Retirement Accounts, Benefits And Plans**

Type	Where Located	Beneficiary(ies)	Account #	Value

**16. Life Insurance (List all policies owned by the Decedent at the time of his death. Make sure that the insurer has been notified of the decedent’s death.)**

Insured	Beneficiary(ies)	Type (Term, Whole, Etc.)	Amount

**17. Debts/Obligations of the Decedent:**

Reason The Money Is Owed	Creditor	Debtor	Amount Owed