



Decedent Estate Worksheet

YOUR PERSONAL INFORMATION

Your name: _____ Relationship to Decedent: _____

Your Street Address: _____

City: _____ State: _____ Zip: _____

Cell Phone: _____ Home Phone: _____ Work Phone: _____

DECEDENT'S INFORMATION

Name of Decedent: _____ Decedent Social Security #: _____

Decedent Date of Birth: _____ Date of Passing: _____

Do you have a Certificate of Death? Yes No

Living arrangements at passing: _____

Street Address: _____

City: _____ State: _____ Zip: _____

DECEDENT'S ESTATE PLAN

Did the Decedent have a will to probate? Yes No (if yes, please bring a copy)

Did the Decedent have an existing trust(s)? Yes No (if yes, please bring a copy)

FAMILY INFORMATION

Was the Decedent married? Yes No

If yes, what is/was the name of the Decedent's spouse? _____

Is the Decedent spouse still living? Yes No

If no, date of the Decedent's spouse passing? _____

If yes, Decedent spouse's street address: _____

City: _____ State: _____ Zip: _____

Decedent's Children:

Name	Date of Birth	Current Marriage	Previous Marriage	Adopted
1. _____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. _____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. _____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Have any children received an advance on their inheritance or are any children financially indebted to the Decedent?

Yes No

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Explain: _____

Are any children deceased? Yes No

Name(s) of deceased child(ren): _____

Did the Decedent child(ren) leave any children? Yes No

Decedent Grandchildren, if any:

Name	Date of Birth	Parents
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

Other pertinent family information or explanation of above items: _____

Is this probate: **Contested** (Family issues and disagreements are present)
 Uncontested (No family issues appear to be present, all in agreement)

PERSONAL REPRESENTATIVE

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

Yes No

If yes, who? _____

SAFE DEPOSIT BOX

Did the Decedent have a safe deposit box? Yes No

If yes, where? _____

Does anyone else have access to the box? No Yes, who: _____

PROFESSIONALS

Did the Decedent have an attorney? Yes No Unsure

Did the Decedent have an accountant? Yes No Unsure

Did the Decedent have a financial planner? Yes No Unsure

If yes, give name and address: _____

INFORMATION REGARDING DECEDENT'S ASSETS

Estimated net worth of the estate: \$ _____

- To the extent possible, please collect information and documents regarding the Decedent's accounts held at financial institutions:
- To the extent possible, collect information and documents regarding the Decedent investments:
 - Cash or money fund accounts, or certificates of deposit with stockbroker firms.
 - Stocks, bonds, and mutual funds where the broker holds the certificates and sent the Decedent periodic statements showing the account balances.
 - Mutual funds where the Decedent dealt directly with the issuing company rather than through a stockbroker.
 - Stocks and bonds (other than U.S. Savings Bonds) where the Decedent held the certificates in their possession.
 - U.S. Savings Bonds
 - Treasury bills or other government securities.
 - Other securities (describe): _____

Retirement Plans

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

List beneficiary: _____

- Employer provided sharing, retirement, or other benefit plans.

List beneficiary: _____

Real Estate

- Personal residence located in the state(s) of: _____
- Other property. How many different parcels of real estate did the Decedent own, other than his/her personal residence?

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

Provide addresses of these parcels:

1. _____
2. _____
3. _____

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Bank Accounts

Bank #1:	_____	Acct. #:	_____
	Acct. Type: _____	Acct. Value: \$	_____
Bank #2:	_____	Acct. #:	_____
	Acct. Type: _____	Acct. Value: \$	_____
Bank #3:	_____	Acct. #:	_____
	Acct. Type: _____	Acct. Value: \$	_____

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

- Promissory note(s)/mortgage secured by real estate. Amount(s) owed: \$ _____
- Unsecured promissory note(s). Amount(s) owed: \$ _____

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

Insurance Company	Face Amount	Type of Policy
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

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.

Name of annuitant: _____

Type of annuities: _____

Value and type: _____

Retirement/Qualified: _____

Personal property:

Yes No

- Household furniture and appliances. Approx. worth: \$ _____
- Collections – art, antiques, valuable jewelry. Approx. worth: \$ _____
- Automobiles. Approx. worth: \$ _____
- Boats. Approx. worth: \$ _____
- Motor homes. Approx. worth: \$ _____



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Yes No

- Business machinery and equipment. Approx. worth: \$ _____
- Personal equipment and tools. Approx. worth: \$ _____
- Other: _____ Approx. worth: \$ _____

LIABILITIES

Make a list of known liabilities or debts of the Decedent.

Creditor	Amount owed
1. _____	_____
2. _____	_____
3. _____	_____

Other questions for Attorney Connelly:

- 1. _____
- 2. _____
- 3. _____