

# **PROBATE INFORMATION FORM**

- Locate the original Will.
- Identify the person who is named as personal representative.

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
SSN: \_\_\_\_\_

- Obtain 10 certified copies of Death Certificate

➤ Last address of Decedent: \_\_\_\_\_  
\_\_\_\_\_

- If Decedent owed real estate (home, cabin, etc), obtain address and/or legal description of each.

- Surviving Spouse

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
SSN: \_\_\_\_\_

If spouse is deceased: DOD \_\_\_\_\_ and SSN \_\_\_\_\_

- Obtain names, addresses and SSNs of all heirs, devisees, and other interested parties.(Attach separate sheet)
- Obtain copies of statements for all bank accounts, investment accounts, retirement accounts and any other accounts in Decedent's name from the month of Decedent's death for date of death values and inventory.
- Identify Decedent's Financial Advisor (if any)

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

- Locate all life insurance policies.
- Identify all debts and obtain copies of recent statements/invoices

COMPLETE AND RETURN TO US WITH DEATH CERTIFICATE