



Black Black & Brown
Attorneys at Law

Estate Administration Questionnaire

Date: _____

Decedent

Decedent's Full Legal Name: _____

Decedent's Date of Birth: _____ Decedent's S.S. No: (provide at your conference)

Decedent's Date of Death: _____ Place of Death: _____

Decedent's Address at Time of Death: _____

Decedent's Employer (if applicable): _____

Decedent's Usual Occupation: _____

Did Decedent have a Will? No Yes

If yes, what is the date the Will was signed? _____

Did Decedent have a Codicil to the Will? No Yes

If yes, what is the date the Codicil to the Will was signed? _____

Spouse

Spouse's Full Legal Name: _____

Spouse's Date of Birth: _____ Spouse's S.S. No: (provide at your conference)

Is the Decedent's Spouse still living? No Yes

If Decedent's Spouse is living:

Home Address: _____

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

If Decedent's Spouse is no longer living:

Decedent's Spouse's Date of Death: _____

Decedent's Spouse's Place of Death: _____

Did the Decedent's spouse have a Will or Codicil to the Will? No Yes

Executor

Executor's Full Legal Name: _____

Executor's Social Security Number: _____

Executor's Address: _____

Executor's Home Phone: _____ Work Phone: _____ Cell Phone: _____

Executor's E-Mail: _____

Heirs & Legatees

Names and Addresses of Heirs, Legatees, Devisees	Relationship to Decedent	Date of Birth	Social Security Numbers
1. _____	_____	_____	(provide at your conference)
2. _____	_____	_____	(provide at your conference)
3. _____	_____	_____	(provide at your conference)
4. _____	_____	_____	(provide at your conference)
5. _____	_____	_____	(provide at your conference)
6. _____	_____	_____	(provide at your conference)
7. _____	_____	_____	(provide at your conference)
8. _____	_____	_____	(provide at your conference)
9. _____	_____	_____	(provide at your conference)
10. _____	_____	_____	(provide at your conference)

1. Are any of the above legatees or heirs minors, disabled, or in the military?
No Yes; If yes, please list their names _____

2. Were any children adopted by decedent?
No Yes; If yes, please list their names _____

3. Was the decedent previously married?
No Yes If yes, please list former spouse's name, whether any children were born of prior marriage, and their names
4. Did any child of the decedent predecease the decedent?
No_____ Yes_____
- If yes, please indicate the child's name, date of birth and date of death of child

5. Was the decedent a creator, trustee, or beneficiary of any trust?
No Yes
6. Did the decedent execute a premarital or postmarital agreement?
No Yes
7. Did the decedent have a safe deposit box?
No Yes
- If yes, please indicate the name of the bank or financial institution_____
- _____
8. Did the decedent have a live-in caregiver for at least a three-year period of time?
No Yes
9. Might Public Aid have a lien against the decedent for nursing home care?
No Yes
10. List the name and address of the decedent's income tax return preparer:

11. Did the decedent lease any property to or from any other person or company?
No Yes

12. Did the decedent reside in any of the following states while married: Alaska, Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Oklahoma, Oregon, Texas, Washington, or Wisconsin?

No Yes

13. Did the decedent file prior gift tax returns or make any gift that should have been reported?

No Yes

14. Were the decedent and the decedent's spouse U.S. citizens?

No Yes

If no, then identify the citizenship of each spouse: _____

List of Decedent's Assets

A. Cash: (checking, savings, certificates of deposit, money markets)

	Name & Address of Financial Institution	Value	Owner (Decedent, Spouse, Joint Tenant, or Tenant in Common)
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____

B. Stock:

	Name of Stock	Value	Owner
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____

C. Bonds and Government Obligations:

	Name of Bond or Obligation	Value	Owner
1.	_____	_____	_____
2.	_____	_____	_____

D. Promissory Notes: (include intra-family loans)

	Name of Loan	Value	Owner
1.	_____	_____	_____
2.	_____	_____	_____

E. Closely-Held Stock:

	Name of Stock	Value	Owner
1.	_____	_____	_____
2.	_____	_____	_____

F. Partnership Interests:

1. Name of Partnership: _____
Value: _____
General or Limited: _____
Percentage of Ownership: _____
2. Name of Partnership: _____
Value: _____
General or Limited: _____
Percentage of Ownership: _____

G. Retirement Plans:

	Name of Institution And Account No.	Value
1. IRA:	_____	_____
2. Keogh or HR 10 Plan:	_____	_____
3. Pension:	_____	_____
4. 401 (k):	_____	_____
5. Other Plan:	_____	_____

H. Debts of Decedent: (include credit and debit cards)

Name and Address of Creditor	Amount Owed
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

I. Potential Creditors of Decedent: (other than those listed above)

Name of Creditor	Type of Claim	Amount Owed
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

J. Automobiles:

	Make and Model	Year	Value	Owner (Decedent, Spouse, Joint Tenant, Or Tenant in Common)
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

K. Other Property:

1. _____
2. _____
3. _____

L. Non-Farm Real Estate:

Personal Residence

Address	Value	Owner
_____	_____	_____

Other Non-Farm Real Estate

Address	Value	Owner
_____	_____	_____

If the real estate is income producing, give net annual revenue: _____

Does casualty and liability insurance coverage remain in effect? No Yes

Document Checklist

Please provide Black, Black & Brown with copies of any of the following documents that are applicable to the Decedent:

Death Certificate

Will

Codicil to Will

Income Tax Returns for the past three years

Gift Tax Returns

Banking Account Statements

Stock Certificates

Partnership Agreements

Retirement Plan Account Statements

All Outstanding Debts/ Invoices/ Billing Statements

Automobile, Trailer, Boat, Recreation Vehicle, etc. titles

Real Estate (residential, rental, vacation, etc.) Deeds, Mortgages, Property

Premarital or Postmarital Agreements

Trust Agreement (if Decedent was a beneficiary or trustee)