



EWBANK HEYNIGH MCVAY
LAW FIRM

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QUESTIONNAIRE FOR NEW ESTATE

1. Name of Deceased: _____
a/k/a _____

Date of Death: _____

Date of Birth: _____

Social Security Number: _____

County of Last Residence: _____

Did Decedent leave a will? Yes ____ No ____

Do you have possession of said will? Yes ____ No ____

Date of Will: _____

Do you have a copy of the Death Certificate: Yes ____ No ____

2. Name of the Petitioner: _____
Surviving Spouse _____, Child _____, Other _____

Date of Birth: _____ SSN: _____

Address: _____

Telephone Number: (_____) _____

3. Name and address of Personal Representative: _____

4. Names, ages, relationship, SSN and addresses of all heirs:
(including names of deceased children)

NAME	ADDRESS	RELATIONSHIP/AGE	SSN
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5. List all known Real Property (including county situated in and nature of ownership;
mineral rights? production?)

Real Property estimated value: \$ _____

6. List all known personal property (including bank accounts, savings accounts, stocks,
bonds, cash, etc., and how each item is held – addresses, account numbers, etc.)

Personal Property estimated value: \$ _____

Entire Estate does not exceed \$60,000.00: Yes ____ No ____

7. Business Enterprises: _____

8. Did Decedent have a life insurance policy: Yes ____ No ____

Owner: _____

Insured: _____

Beneficiary: _____

Name, address, policy number, face value of policy: _____

9. List all debts, mortgages, or taxes due and unpaid at death:

10. List any transfers made during lifetime of Decedent:

11. List funeral expenses and expense of last illness:

OFFICE USE ONLY:

FORM TO USE: (please check applicable forms)

_____ Petition for Letters of Administration, Appointment of Personal Representative, Appraisers, and Determination of Heirs. (WITH NOTICE)

_____ Petition for Letters of Administration, Appointment of Personal Representative Instanter and Without Notice, Appointment of Appraisers and Determination of Heirs.

_____ Petition for Probate of Will, Appointment of Personal Representative, Appointment of Appraisers, and Determination of Heirs, Devisees and Legatees.

_____ Petition for Probate of Foreign Will.

_____ Consent and Waivers; waiving inventory and formal accounting.

_____ Application for Summary Administration.