

PROBATE QUESTIONNAIRE

1. *General Information About Yourself*

Name _____

Address _____

Telephone Number (Home) _____ (Business) _____

Occupation _____

Business Address _____

Social Security Number _____

Relationship to Decedent _____

2. *General Information About Decedent*

Name _____ Citizenship _____

Decedent's most recent address _____

Decedent's county of residence _____

Was Decedent born in Texas? _____ If no, when did Decedent move to Texas? _____

What was Decedent's occupation at the time of death? _____

Decedent's business address & telephone _____

List the names, addresses and telephone numbers of Decedent's physicians at the time of death _____

How many children were born to or adopted by Decedent? _____

How many children have survived Decedent? _____

List the names, addresses and telephone numbers of Decedent's heirs and their relationship to decedent. (Include all children born, or adopted by Decedent)

Decedent's marital status at time of death

____ Married ____ Single ____ Legally Separated ____ Widow(er) ____ Divorced

List the dates of each marriage, name of spouse, and whether the marriage was terminated (if terminated, state how ie. divorce, death).

Was Decedent confined in a hospital during his/her last illness? _____ If yes, list name of hospital _____

Does Decedent have a safe deposit box either alone or jointly with another? _____ If yes, state the name of the Bank where the box is located _____

Attach a list of the contents of the safe deposit box.

Was Decedent a veteran? _____

Did Decedent have an accountant or bookkeeper assist with the preparation of Decedent's Federal Income Tax Returns? _____ If yes, please state name, address and telephone number _____

Did Decedent own any interest in a business, joint venture or partnership? _____ If yes, please describe _____

Decedent's Social Security Number _____

3. Decedent's Property

Please list Decedent's property below. Note that Decedent's property includes everything owned by Decedent, either alone or jointly with another, at death:

Real Estate

Property 1 - Location _____

Date Acquired _____

How Acquired (purchase, inheritance or gift) _____

If purchased, state original cost _____

Have substantial improvements been made since acquired by Decedent? _____ If yes, please describe, including cost of improvement _____

Property 2 - Location _____

Date Acquired _____

How Acquired (purchase, inheritance or gift) _____

If purchased, state original cost _____

Have substantial improvements been made since acquired by Decedent? _____ If
yes, please describe, including cost of improvement _____

Mineral and Royalty Interests - Did Decedent own any mineral or royalty interests? _____
If yes, please describe _____

Stocks and Bonds - List any stocks or bonds owned by Decedent at death

Description (Name of Stock or Bond)	No. Of Shares	Name(s) on Certificate
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Name and telephone number of Decedent's stock broker _____

Cash, Bank Accounts and Promissory Notes

Name of Bank	Type of Account	Holders	Balance
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Certificates of Deposit

Name of Bank	Date Acquired Date Due	Name on CD	Amount
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Cash on Hand

Location _____ Amount _____

Promissory Notes - Did Decedent hold any promissory notes at the time of death? ___ If yes, please describe _____

Life Insurance

Name of Insurance Co.	Policy No.	Beneficiary	Amount
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Miscellaneous Property

Automobiles - Year	Make	Model	Value on date of death
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Household Furnishings (other than antiques) - approximate value _____

Antiques and other articles of intrinsic value (coin or stamp collections, guns, etc.)
(Article and approx. value) _____

Uncashed check held by Decedent on date of death _____

Other property owned by Decedent _____

Retirement Benefits - Was Decedent a participant in any pension or profit sharing plan?

_____ If yes, is anyone receiving a monthly pension from Decedent's employer following Decedent's death? _____. If yes, state name and monthly amount _____

Annuities - Was Decedent receiving an annuity at death? _____ If yes, did the annuity continue to pay any benefit to a designated beneficiary after Decedent's death? _____.

Debts - List all of Decedent's alleged debts, including charge accounts, household utilities, city and state taxes on any real estate, car notes, boat loans etc.

Description	Collateral	Amount Due
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Is there any credit life insurance on any of the above debts? _____. If yes, please describe

Miscellaneous

If you have not already done so, please submit the following documents to this office:

1. Death Certificate
2. All Life Insurance Policies (i) insuring Decedent's life and (ii) owned by Decedent at time of death)
3. List of contents of safe deposit box
4. Deeds to any real estate and related loan documents, and a copy of the title policy and any closing statement relating to Decedent's purchase of the property
5. Copy of Decedent's Federal Income Tax Returns for the current year (if available) and for the last 3 years.
6. Certificates of Title to any automobiles, mobile homes, tractors, trailers or boats.
7. Financial statements and tax returns for any business, joint venture or partnership for the current year, if any, and for the last 5 years
8. Copy of Decedent's Will
9. Copies of statements of account for each of Decedent's bank accounts at his/her date of death
10. Copies of statements of account for each of Decedent's brokerage accounts at his/her date of death
11. Copies of statements of account for each of Decedent's debts, mortgages and charge accounts at his/her date of death.