

PROBATE QUESTIONNAIRE

For the probate of: _____ **Date of death** _____

Appointment date and time: _____

Names of persons attending conference: _____

Deceased's full legal name, nickname:		
Birthdate:	Place of birth:	SS#:
Surviving spouse full legal name:		
Date of marriage:	Place of marriage:	Phone:
Address:		
Surviving spouse e-mail:		

Personal Representative (full name and nicknames):	
Address (actual and mailing):	Soc. Sec. #
E-mail address:	All Phone #s:
Driver's License: State #	Date of Birth:

CHILDREN: If predeceased, attach list of names and addresses of their children or grandchildren, birthdates, dates of death, surviving spouse, adopted, etc.

	Husband's only	Wife's only	Both
1. Child's name, nickname:			
Date of birth:	Place of birth:		
Address:			
E-mail address:			
Phone #:	Predeceased: Yes ____ No ____		
Spouse's name:			
2. Child's name, nickname:			
Date of birth:	Place of birth:		
Address:			
E-mail address:			
Phone #:	Predeceased: Yes ____ No ____		
Spouse's name:			

3. Child's name, nickname:				
Date of birth:		Place of birth:		
Address:				
E-mail address:				
Phone #:		Predeceased: Yes ____ No ____		
Spouse's name:				
4. Child's name, nickname:				
Date of birth:		Place of birth:		
Address:				
E-mail address:				
Phone #:		Predeceased: Yes ____ No ____		
Spouse's name:				
5. Child's name, nickname:				
Date of birth:		Place of birth:		
Address:				
E-mail address:				
Phone #:		Predeceased: Yes ____ No ____		
Spouse's name:				
6. Child's name, nickname:				
Date of birth:		Place of birth:		
Address:				
E-mail address:				
Phone #:		Predeceased: Yes ____ No ____		
Spouse's name:				
7. Child's name, nickname:				
Date of birth:		Place of birth:		
Address:				
E-mail address:				
Phone #:		Predeceased: Yes ____ No ____		
Spouse's name:				

Beneficiaries and Heirs other than the children (please note if any are minors), including grandchildren:

Name:	E-mail:
Address:	Date of birth:
Phone:	Minor Yes ____ No ____
Relationship	

Name:	E-mail:
Address:	Date of birth:
Phone:	Minor Yes ____ No ____
Relationship	

Name:	E-mail:
Address:	Date of birth:
Phone:	Minor Yes ____ No ____
Relationship	

Name:	E-mail:
Address:	Date of birth:
Phone:	Minor Yes ____ No ____
Relationship	

Name:	E-mail:
Address:	Date of birth:
Phone:	Minor Yes ____ No ____
Relationship	

Be as complete as you can. If something does not apply, write "none". Make a note whether property is community or separate. To complete the probate, we will need exact values as of the date of death, but for now, just list them to the extent known, giving at least approximate values.

How accurate and complete your information is can determine how fast your probate can be completed. Please be prepared to make payment with the Questionnaire.

We need the following:

_____ The **original** Will and any **original** Codicils. You can send us copies and bring the originals to your appointment.

_____ Originals of any personal property letters or other writings to be read with the Will.

_____ **Original** Death Certificate

_____ Copy of Deeds for all real property, whether in or out of Idaho (not the assessor's notice), with approximate values of each. If you haven't found the deeds yet, make a list of all properties with their approximate value. We need street addresses and what type of property it is and whether it is occupied and by whom.

_____ Copy of statements for all bank accounts, stocks, bonds, CDs etc. showing balances on the actual date of death. The bank or stock broker can generate this for you.

_____ **Original** titles for cars, motorcycles, manufactured homes, ATVs, motorhomes, or any other recreational vehicles, and approximate values of each. If you haven't found the titles yet, make a list of the items.

_____ List of any unusually valuable items or collections with approximate values, bit coins, etc.

_____ List of any unpaid debts, including mortgages, including creditor, account number, and amount due, known to you at this time.

_____ Copy of any Trust, including amendments and attachments, with list of and values of assets held by the Trust. For real estate in the Trust, copies of the deeds conveying the real estate to the Trust.

_____ Copy of the face page and the beneficiary page of all Life Insurance policies, IRA's, Annuities, SEP's, 401(K)'s, with approximate values.

_____ Any Community Property Agreement, Devolution Agreement, Pre-Nuptial, or Post-Nuptial Agreement.

To make sure you get all your questions answered, it would be helpful to make a list of any questions you may have and bring them to your appointment. Thank you for calling our office.

Robert L. Aldridge, Chartered

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For a map with directions, see our web site at RLAldridgeLaw.com