

PROBATE QUESTIONNAIRE
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Date: _____

Legal Name: _____

Address: _____

County of Residence: _____

Email Address: _____

Telephone: _____

Date of Birth: _____

Last 4 of Social Security No. _____ Last 4 of Driver's License No. _____

Decedent's Legal Name: _____

County of Residence: _____

County of Death: _____

Date of Birth: _____ Date of Death: _____

Last 4 of Social Security No. _____ Last 4 of Driver's License No. _____

	YES	NO
Did Decedent leave a Will?	_____	_____
If Decedent left a Will, do you have the original?	_____	_____
Did Decedent have a premarital agreement?	_____	_____
Did Decedent ever file a Gift Tax return (Form 709)?	_____	_____
Is Decedent subject to an ongoing obligation to a former spouse?	_____	_____
Is Decedent the creator or beneficiary of a trust?	_____	_____
Is Decedent a current party or potential party to a lawsuit?	_____	_____

Family Information

List all of Decedent's living children.

Legal Name

Address

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

List all deceased children.

Legal Name(s)

	YES	NO
Did Decedent adopt any children?	_____	_____
Did Decedent treat any non-biological children as his/her own?	_____	_____

Estate Assets

Real Estate & Mineral Interests

For each tract of real property (including minerals), list the address, and county (and state if outside of Texas).

Address	County
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Cash/Savings

For each account, list the bank name, the beneficiaries (if any), and estimated value.

Institution Name	Beneficiaries	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Stocks, Bonds, Mutual Funds (excluding those held in retirement accounts)
For each account, list the institution name, the beneficiaries, and estimated value.

Institution Name	Beneficiaries	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Retirement Accounts, 401(k), Pension plans, Annuities, IRAs
For each account, list the institution name, the beneficiaries, and estimated value.

Institution Name	Beneficiaries	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Business Interests

For each business, list the legal name, ownership, and value.

Business Name	Ownership Interest	Value

Life Insurance

For each policy, list the beneficiaries, and estimated cash value.

Institution Name	Beneficiaries	Cash Value

Digital Assets (cryptocurrency, bitcoin, NFTs, etc.)
Describe generally and include estimated value.

Description	Beneficiaries	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Estimated total value of Decedent's estate

\$ _____

	YES	NO
Did Decedent own any separate property?	_____	_____