

# CASE, RAJNOHA & BOUDREAU, LLP

## Attorneys at Law

### PROBATE INFORMATION SHEET

Today's Date: \_\_\_\_\_

Referral Source (Circle all that Apply)  
(Internet Yellow Book Yellow Pages Friend)

Your Name: \_\_\_\_\_

#### Deceased

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

DOB: \_\_\_\_\_ DOD: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### Personal Representative/Administrator

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

DOB: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Home Tel: \_\_\_\_\_

Work Tel: \_\_\_\_\_

Cell: \_\_\_\_\_

Was there a will? Y / N If yes, has the will been located? Y / N  
[ Attorney use only: Date of Will: \_\_\_\_\_ Supervised/Independent Bond waiver? Y / N ]

Is there a surviving spouse? Y / N If no: never married / already deceased / divorced

Are there surviving children? Y / N

If there is a spouse, are they the parent of ALL children? Y / N

If there is no spouse or children, is there a surviving parent? Y / N

**Beneficiary's Full Name:** \_\_\_\_\_ **Birth Date:** \_\_\_\_\_ **SSN:** \_\_\_\_\_ **How related?** \_\_\_\_\_

- Include predeceased beneficiaries, with date of death
- If beneficiary is a minor or has been adjudicated incompetent, include information for parent/guardian

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### Assets:

Real Estate (give address and estimated value)

1. \_\_\_\_\_ \$ \_\_\_\_\_
2. \_\_\_\_\_ \$ \_\_\_\_\_

Bank Accounts, CDs, etc. (give type of account, location, estimated value)

1. \_\_\_\_\_ \$ \_\_\_\_\_
2. \_\_\_\_\_ \$ \_\_\_\_\_
3. \_\_\_\_\_ \$ \_\_\_\_\_
4. \_\_\_\_\_ \$ \_\_\_\_\_
5. \_\_\_\_\_ \$ \_\_\_\_\_

Other Investments (give type of account, location, estimated value)

1. \_\_\_\_\_ \$ \_\_\_\_\_
2. \_\_\_\_\_ \$ \_\_\_\_\_
3. \_\_\_\_\_ \$ \_\_\_\_\_

Other Property (give type of property, location, estimated value)

1. \_\_\_\_\_ \$ \_\_\_\_\_
2. \_\_\_\_\_ \$ \_\_\_\_\_
3. \_\_\_\_\_ \$ \_\_\_\_\_
4. \_\_\_\_\_ \$ \_\_\_\_\_

Life Insurance Policies (give holder of policy and estimated value)

1. \_\_\_\_\_ \$ \_\_\_\_\_
2. \_\_\_\_\_ \$ \_\_\_\_\_

Retirement Plans, IRAs, etc. (give type of account, location, estimated value)

1. \_\_\_\_\_ \$ \_\_\_\_\_
2. \_\_\_\_\_ \$ \_\_\_\_\_

Liabilities and Debts (give type of debt, to whom owed, estimated amount due)

1. \_\_\_\_\_ \$ \_\_\_\_\_
2. \_\_\_\_\_ \$ \_\_\_\_\_
3. \_\_\_\_\_ \$ \_\_\_\_\_
4. \_\_\_\_\_ \$ \_\_\_\_\_
5. \_\_\_\_\_ \$ \_\_\_\_\_
6. \_\_\_\_\_ \$ \_\_\_\_\_
7. \_\_\_\_\_ \$ \_\_\_\_\_