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**PROBATE INTAKE FORM**

**PART I: THE DECEDENT**

Do you have a death certificate for decedent? YES NO  
If yes, please bring a copy of the Death Certificate to the first meeting with you.

Decedent's name

Date of death:

Place of death:

Residence address at death:

Social security number:

**PART II: THE DECEDENT'S WILL**

Did the decedent die with a Will? YES NO  
(If no, skip to Part III)

Date of Will to be admitted to probate:

Date of Codicil (if any) to be admitted to probate:

Legatees under Will/Codicil:

Name

Address

Notes

Executors under Will/Codicil:

Name	Address	Notes
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**PART III: THE DECEDENT'S HEIRS**

Was decedent married at death? (If yes, name of spouse)	YES	NO
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Was decedent previously married? If yes, complete the following:	YES	NO
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Name	Date Ended	Reason Ended
Spouse #1		
Spouse #2		
Spouse #3		
Spouse #4		

Did the decedent have or adopt any children? (If yes, complete the following for living children and children of a deceased child:	YES	NO
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Name	Address	Notes
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If there is no Will, who will act as Administrator?

EXHIBIT A  
**THE DECEDENT'S PROPERTY**

Probate Property

Real Estate

Bank Accounts

Investment Accounts  
(non-retirement)

Retirement Accounts  
(401k, IRA, etc.)

Life Insurance

Other

Non-Probate Property

Real Estate

Bank Accounts

Investment Accounts  
(non-retirement)

Retirement Accounts  
(401k, IRA, etc.)

Life Insurance

Other