



**INFORMATIONAL QUESTIONNAIRE
PROBATE/NON-PROBATE**

DECEASED

Name of Deceased: _____

Date of Death: _____ Cause of Death: _____

Was there a Will? Yes ___ No ___ if yes, Date of Will _____

County of Death: _____

Address: _____

Telephone Number: _____ Deceased Social Security _____

****Attach copy of Death Certificate****

Date of Birth _____ US Citizen: Yes ___ No ___

SPOUSE

Name of Spouse: _____ Address if different than above _____

Work Telephone Number: _____ Social Security Number: _____

Date of Birth: _____ Date of Marriage: _____

If you are a widow or widower, are any assets still in your deceased spouses name?

PERSONAL REPRESENTATIVE

Name: _____

Address: _____

Telephone Number: _____ Social Security _____

Other Contact Info. _____

CHILDREN/STEP-CHILDREN/or OTHER HEIRS RECEIVING AN INHERITANCE

****Please indicate how related****

Legal Name: _____ **Age:** _____

Address: _____ **Phone Number:** _____

Social Security Number: _____

Legal Name: _____ **Age:** _____

Address: _____ **Phone Number:** _____

Social Security Number: _____

Legal Name: _____ **Age:** _____

Address: _____ **Phone Number:** _____

Social Security Number: _____

Legal Name: _____ **Age:** _____

Address: _____ **Phone Number:** _____

Social Security Number: _____

Legal Name: _____ **Age:** _____

Address: _____ **Phone Number:** _____

Social Security Number: _____

Legal Name: _____ **Age:** _____

Address: _____ **Phone Number:** _____

Social Security Number: _____

Legal Name: _____ **Age:** _____

Address: _____ **Phone Number:** _____

Social Security Number: _____

Legal Name: _____ **Age:** _____

Address: _____ Phone Number: _____

Social Security Number: _____

ASSETS: The personal representative has a duty to determine the decedent's asset values as of the date of death for purposes of preparing an inventory.

1. REAL PROPERTY **Please supply a copy of the deed and property tax statements**

Physical Address: _____

County _____ Tax Parcel Number: _____

Legal Description: _____

Name on Title: _____

Assessed Value: _____ Fair Market Value: _____

Is there a Mortgage? If so, with Whom: _____

Balance Owed on Mortgage: \$ _____

REAL PROPERTY

Physical Address: _____

County _____

Tax Parcel Number: _____

Legal Description: _____

Name on Title: _____

Assessed Value: _____ Fair Market Value: _____

Is there a Mortgage? If so, with Whom: _____

Balance Owed on Mortgage: \$ _____

REAL PROPERTY

Physical Address: _____

County _____

Tax Parcel Number: _____

Legal Description: _____

Name on Title: _____

Assessed Value: _____ Fair Market Value: _____

Is there a Mortgage? If so, with Whom: _____

Balance Owed on Mortgage: \$ _____

REAL PROPERTY

Physical Address: _____

County _____

Tax Parcel Number: _____

Legal Description: _____

Name on Title: _____

Assessed Value: _____ Fair Market Value: _____

Is there a Mortgage? If so, with Whom: _____

Balance Owed on Mortgage: \$ _____

REAL PROPERTY

Physical Address: _____

County _____

Tax Parcel Number: _____

Legal Description: _____

Name on Title: _____

Assessed Value: _____ Fair Market Value: _____

Is there a Mortgage? If so, with Whom: _____

Balance Owed on Mortgage: \$ _____

2. **STOCKS/BONDS/SECURITIES**

Name Financial Institution: _____

Broker Name: _____

Address: _____

Telephone Number: _____

****This is the type of information needed to put onto the Inventory and Declaration of Values****

Account Number: _____

Cash balance \$ _____

Stock/Mutual Fund Name _____

Cusip # _____ How many shares _____

high/low/average value **on date of decedent's death**: \$ _____ \$ _____ Average \$ _____

How account titled: i.e., Payable on death or Joint Tenancy with Right of Survivorship _____

****This is important to know in order to distinguish between a probate or a non-probate asset**

3. **BANK ACCOUNTS:** (please attach copies statements with **date-of death balances**)

Name of Bank: _____

Branch Address: _____

Checking Account Number: _____

Savings Account Number: _____

Balance on **Date of Death**: _____

Names accounts held in: _____

How account titled: i.e., Payable on death or Joint Tenancy with Right of Survivorship _____

****This is important to know in order to distinguish between a probate or a non-probate asset**

Name of Bank: _____

Branch Address: _____

Checking Account Number: _____

Savings Account Number: _____

Balance on **Date of Death**: _____

Names accounts held in: _____

How account titled: i.e., Payable on death or Joint Tenancy with Right of Survivorship _____

****This is important to know in order to distinguish between a probate or a non-probate asset**

Name of Bank: _____

Branch Address: _____

Checking Account Number: _____

Savings Account Number: _____

Balance on **Date of Death**: _____

Names accounts held in: _____

How account titled: i.e., Payable on death or Joint Tenancy with Right of Survivorship _____

****This is important to know in order to distinguish between a probate or a non-probate asset**

4. PERSONAL PROPERTY

Cars, boats, trailers, etc. (**please attach a copy of the vehicle title**)

Year _____ Make _____ Model _____

Name(s) on Title: _____

Vehicle ID Number: _____

Present Value: _____

Lien: Yes ___ No ___ Payable to _____

Amount Owed: _____ Monthly Pmt. _____

Year _____ Make _____ Model _____

Name(s) on Title: _____

Vehicle ID Number: _____

Present Value: _____

Lien: Yes ___ No ___ Payable to _____

Amount Owed: \$ _____ Monthly Pmt. \$ _____

Year _____ Make _____ Model _____

Name(s) on Title: _____

Vehicle ID Number: _____

Present Value: _____

Lien: Yes ___ No ___ Payable to _____

Amount Owed: _____ Monthly Pmt. _____

Year _____ Make _____ Model _____

Name(s) on Title: _____

Vehicle ID Number: _____

Present Value: _____

Lien: Yes ___ No ___ Payable to _____

Amount Owed: _____ Monthly Pmt. _____

5. MISCELLANEOUS PERSONAL PROPERTY

Please list a **total** of all decedent's personal property such as antiques, jewelry, art work, furniture and fixtures, stamp collections, gun collections, wine collections and the present value of each. Note: This is an approximation. An actual inventory is not needed unless requested by an heir.

IDDINS LAW GROUP
25052 104TH AVE. SE, STE. B
KENT, WA 98030
P: 253-854-1244 • F: 253-852-4268

6. Mortgages, Notes or Contracts owed to decedent: List debtor's name, address, account number, amount owed at date of death and monthly payment.

7. BUSINESS/PARTNERSHIPS

List any interest, if any, federal tax identification number, and whether operated as sole proprietorship, partnership or corporation. Describe in full detail: _____

NON-PROBATE ASSETS:

8. LIFE INSURANCE POLICIES & ANNUITIES

Company: _____

Policy or Annuity Number: _____

Beneficiary: _____

Amount to be paid out: _____

Company: _____

Policy or Annuity Number: _____

Beneficiary: _____

Amount to be paid out: _____

Company: _____

Policy or Annuity Number: _____

Beneficiary: _____

Amount to be paid out: _____

9. PENSIONS/DEATH BENEFITS

Company Name: _____

Amount of Pension: _____

Beneficiary: _____

Company Name: _____

Amount of Pension: _____

Beneficiary: _____

10. IRA'S

Name of Financial Institution: _____

Address: _____

Broker Name: _____ Telephone Number: _____

Beneficiar(ies): _____

Amount on Date of Death: _____

Name of Financial Institution: _____

Address: _____

Broker Name: _____ Telephone Number: _____

Beneficiar(ies): _____

Amount on Date of Death: _____

Name of Financial Institution: _____

Address: _____

Broker Name: _____ Telephone Number: _____

Beneficiar(ies): _____

Amount on Date of Death: _____

LIABILITIES

Estimate of Liabilities: \$ _____

Under most circumstances, the exact nature of liabilities will not be known due to medical bills and other surprises that come in the mail. However, at the beginning of my representation of the personal representative, we need a good faith estimate to determine if the estate is solvent.

Liabilities Supplement:

Attached to this sheet is a Liabilities Supplement form for you to fill out. You are encouraged to keep us informed throughout the probate if you become aware of any other liabilit(ies) that may crop up.

Warning: Do not pay liabilities without consulting the law office unless it is to pay the mortgage to keep it current, car loans, as well as utilities. All of these you should keep current. In the event of an insolvent estate, the balance of the debts will need to be paid in a certain order and we will help you with that task. This is the reason for the four-month creditor claim period.