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### PROBATE INFORMATION FORM

NOTICE: We will use the information supplied on this form to prepare a probate inventory and the estate and inheritance tax returns, if required. Such information will enable us to make a determination of whether such returns are required, and will also be used for other purposes relating to the probate process. Information supplied by you must be complete and accurate, as we undertake no obligation to verify completeness or accuracy.

#### I. Information about the Executor

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

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

Phone: Work: \_\_\_\_\_ Home: \_\_\_\_\_ Cell: \_\_\_\_\_

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

Co-Executor: \_\_\_\_\_

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

Phone: Work: \_\_\_\_\_ Home: \_\_\_\_\_ Cell: \_\_\_\_\_

#### II. Information About Decedent

A. Name: \_\_\_\_\_

B. Date of Birth: \_\_\_\_\_ C. Date of Death: \_\_\_\_\_

D. Residence at Time of Death: \_\_\_\_\_

E. City and County Where Decedent Die: \_\_\_\_\_

F. Social Security Number: \_\_\_\_\_

**III. Decedent's Marital History**

**A. Decedent's Marital Status at Time of Death**

**Married**

Date of Marriage to Surviving Spouse: \_\_\_\_\_

**Widow or Widower**

Name of Deceased Spouse: \_\_\_\_\_

Date of Death of Deceased Spouse: \_\_\_\_\_

Social Security Number of Deceased Spouse: \_\_\_\_\_

Was the estate probated?                      Yes                      No

Name of Court: \_\_\_\_\_

**Single**

**Legally Separated**

Name of Legally Separated Spouse: \_\_\_\_\_

**Divorced - Include All Previous Marriages**

Name of Former Spouse: \_\_\_\_\_

Current Residence of Former Spouse: \_\_\_\_\_

\_\_\_\_\_

Date Divorce Became Final: \_\_\_\_\_

- B. If the Decedent was ever married, was there a pre-marital agreement or other written agreement between Decedent and Decedent's spouse governing their property?**  
Yes                      No    If yes, please attach a copy.

**IV. Safe Deposit Box(es)**

A. List all safe deposit boxes in the Decedent's name or to which the Decedent had a key or where the Decedent's name was on the signature card.

1. Location: \_\_\_\_\_

2. Number: \_\_\_\_\_

3. Person Who Now Has the Keys: \_\_\_\_\_

4. Keys Held \_\_\_\_\_ individually, or \_\_\_\_\_ jointly, with \_\_\_\_\_

B. Is there any property in any safe deposit box of the Decedent which you believe should not be declared as Decedent's property? \_\_\_\_\_ Yes          No

If yes, please state the reasons: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

C. If there is any property in Decedent's safe deposit box which is *not* listed anywhere else on this form, please list the property here:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CLIENT FOCUSED. RESULTS DRIVEN.**