

DAVIS SCHILKEN, PC
LAW OFFICES

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Estate Administration: Initial Contact

“Client Intake From”

Date: _____

Name of contact: _____

QUESTIONS

Did our firm or one of our lawyers prepare the decedent’s estate plan? Yes No

If so, when? _____

If not, who prepared the estate plan? _____

How were you referred to our office? _____

Relationship to decedent: _____

Are you the designated trustee, personal representative? Yes No

If not, who is? _____

Confirm Contact address: _____

Telephone numbers: HM: _____ WK: _____

Cell: _____ Fax: _____

Best time to call: _____

1. Full name of decedent: _____

2. Social Security No. if known: _____

3. CONFIRM: Date of death: _____

4. In what county did the decedent reside? _____

5. Was the decedent married? Yes No

6. Is the spouse living? Yes No

7. Did decedent have ORIGINAL Will or know its location? Yes No

8. Did decedent have ORIGINAL Trust or know its location? Yes No

9. ROUGH estimate of total estate:

Real Property:	\$ _____	Bank Accounts:	\$ _____
Investments:	\$ _____	Life Insurance:	\$ _____
Other:	\$ _____	Total:	\$ _____

10. Did decedent own any real property?

If yes, where is it located? _____

11. Is there any out-of-state property?

If yes, which State(s)? _____

12. Did decedent own any of the following assets: (check all that apply)

- _____ Stocks
- _____ Bonds
- _____ IRAs
- _____ 401Ks
- _____ Life insurance
- _____ Time-share property
- _____ Mobile-Home
- _____ Other: _____
- _____ Other: _____

ITEMS TO BRING TO APPOINTMENT

1. Questionnaire – Client Intake Form (this document)
2. Death certificates (5 certified originals)
3. Life insurance policies (if any)
4. Any financial information you can obtain (including but not limited to: statements regarding bank accounts, checking accounts, savings, stocks, bonds, real estate, mineral rights, time share properties, mobile homes, IRAs, annuities, corporate or limited partnership interests, etc.) as close to the date of death as possible.
5. Decedent’s tax returns (this year/last year)
6. ORIGINAL Trust & related documents, including the original will