

**Estate Information Sheet**

1. Decedent's Full Name: \_\_\_\_\_

2. Date of Birth: \_\_\_\_\_

3. Date of Death: \_\_\_\_\_

4. Decedent's SSN: \_\_\_\_\_

5. Marital Status: (please circle) Single Married Widowed Divorced

6. Spouse Information:

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

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

Date of Death (if applicable) \_\_\_\_\_

Date of Final Divorce Decree (if applicable) \_\_\_\_\_

7. Decedents Address: \_\_\_\_\_

City & State: \_\_\_\_\_

County: \_\_\_\_\_

8. Did Decedent have a Will? Yes or No

9. Decedent's Occupation: \_\_\_\_\_

10. Decedent's Living Children & Other Beneficiaries:

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

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

SSN or ID Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

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

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

SSN or ID Number: \_\_\_\_\_

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Date of Birth: \_\_\_\_\_

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

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

SSN or ID Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

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

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

SSN or ID Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

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

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

SSN or ID Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

11. Did the Decedent create any trusts during his or her lifetime? Yes or no

12. Has the Decedent filed any gift tax returns: Yes or no

13. Did the Decedent Own Real Estate?

Address of Property: \_\_\_\_\_

Ownership: Individually or Joint?

Mortgage on Property: \_\_\_\_\_

\_\_\_\_\_

Address of Property: \_\_\_\_\_

Ownership: Individually or Joint?

Mortgage on Property: \_\_\_\_\_

\_\_\_\_\_

Address of Property: \_\_\_\_\_

Ownership: Individually or Joint?

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Mortgage on Property: \_\_\_\_\_  
\_\_\_\_\_

14. Did the Decedent Own Stocks or Bonds? Yes or No (Please attached list of stocks and bonds owned)

15. Please provide detail of decedent's cash in bank accounts, investment accounts, and certificates of deposit.

Name of Financial Institution: \_\_\_\_\_

Account Type & Number: \_\_\_\_\_

Account Balance as of Last Statement: \_\_\_\_\_

Name of Financial Institution: \_\_\_\_\_

Account Type & Number: \_\_\_\_\_

Account Balance as of Last Statement: \_\_\_\_\_

Name of Financial Institution: \_\_\_\_\_

Account Type & Number: \_\_\_\_\_

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Account Type & Number: \_\_\_\_\_

Account Balance as of Last Statement: \_\_\_\_\_

Name of Financial Institution: \_\_\_\_\_

Account Type & Number: \_\_\_\_\_

Account Balance as of Last Statement: \_\_\_\_\_

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- 16. Did the Decedent hold any mortgages, promissory notes, or forgive any notes: Yes or no
- 17. Did the decedent own any Life insurance policy? Yes or No (If yes please provide Form 712 Statement of Life Insurance Proceeds from the insurance company)
- 18. Did the decedent have any interest in partnerships or own an un-Incorporated business? Yes or No (If yes please provide us with the last 3-5 years of tax returns)
- 19. Please provide information on any IRA, Pension or Annuity accounts

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

Policy Number: \_\_\_\_\_

Date of Death Value: \_\_\_\_\_

Name of Beneficiary: \_\_\_\_\_

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

Policy Number: \_\_\_\_\_

Date of Death Value: \_\_\_\_\_

Name of Beneficiary: \_\_\_\_\_

Company Name:

Policy Number: \_\_\_\_\_

Date of Death Value: \_\_\_\_\_

Name of Beneficiary: \_\_\_\_\_

\_\_\_\_\_

Company Name:

Policy Number: \_\_\_\_\_

Date of Death Value: \_\_\_\_\_

Name of Beneficiary: \_\_\_\_\_

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20. Please list any other valuables or assets owned by the decedent at date of death ( jewelry, automobiles, furniture etc.)

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21. Please provide information on all funeral expenses:

Payee: \_\_\_\_\_

Amount Paid: \_\_\_\_\_

Services Provided: \_\_\_\_\_

Payee: \_\_\_\_\_

Amount Paid: \_\_\_\_\_

Services Provided: \_\_\_\_\_

22. Please provide information on Decedents outstanding bills and expenses:

Payee: \_\_\_\_\_

Amount Paid: \_\_\_\_\_

Services Provided: \_\_\_\_\_

Payee: \_\_\_\_\_

Amount Paid: \_\_\_\_\_

Services Provided: \_\_\_\_\_

Payee: \_\_\_\_\_

Amount Paid: \_\_\_\_\_

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Services Provided: \_\_\_\_\_

I, \_\_\_\_\_, hereby certify under the pains and penalties of perjury that the above information is complete and true to the best of my knowledge.