

Quote: _____
Down Payment: _____
Payment Plan: _____
Attorneys Intials: _____

PROBATE INTAKE

Name: _____

ADDRESS: _____

Phone: _____ **Alt:** _____

Email: _____ **DATE OF BIRTH:** _____

SSN: _____

1. Is there a Will and do you have the Original I will also need the Death Certificate: _____

2. How many Heirs are there, please list the names addresses and birthdates: _____

3. Please list all real and personal property involved with the Estate: _____

4. Please list all bank accounts, credit card accounts, retirement accounts, life insurance policies:

5. List all debts in the Decedent's name: _____

6. What is your relationship to the Decedent: _____
