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QUESTIONNAIRE FOR HEIRSHIP AND INDEPENDENT ADMINISTRATION

Please answer all questions as fully as possible. Print clearly, especially when writing names and addresses. If you need more room for any question, you can write on the back of the page or attach an additional sheet.

PLEASE NOTE THAT THIS QUESTIONNAIRE IS FOR SOMEONE WHO PASSED AWAY WITHOUT A WILL AND WHO NEEDS A PERSON TO WRAP UP THEIR FINAL AFFAIRS (FOR EXAMPLE, IF THERE IS A LAWSUIT PENDING). IF YOUR LOVED ONE HAD A WILL OR IF YOU JUST NEED THE OWNERSHIP CHANGED TO THE NEXT-OF-KINS' NAMES, THERE MAY BE OTHER OPTIONS. PLEASE STOP AND CALL OR EMAIL ME AT THE CONTACT INFORMATION LISTED ABOVE.

PERSONAL INFORMATION ABOUT THE DECEASED

I. Basic Information:

Full name (including any variations which may appear on legal or financial documents):

Address at the time of death: _____

Date of Birth: _____ Date of Death: _____

Location of death: _____

II. Marital Information:

Name of spouse at date of death (if any): _____

Address (unless listed above): _____

Did the Deceased have any previous spouse(s)? ☐ Yes ☐ No
(If "No", skip the rest of this section.)

Name of former spouse: _____

Date and place of marriage: _____

Reason the marriage ended (such as divorce or death), and date and place of termination:

III. Children:

Full names and ages of any children: _____

Addresses of any children (unless the same as listed above): _____

Are any of the children listed above married? ☐ Yes ☐ No

(If "Yes", please describe): _____

Is the other parent of any of the Deceased's children someone **other than** his or her spouse at the time of death? ☐ Yes ☐ No

(If "Yes", please describe): _____

Are any of the children listed in this questionnaire adopted? ☐ Yes ☐ No

(If "Yes", please list their names and the age they were when adopted): _____

Please explain any special circumstances with respect to any child (for example, children who have passed away before the Deceased, etc.): _____

If a child died before the Deceased, did he or she leave any children (i.e., the Deceased's grandchildren)? If so, please describe. _____

IV. Financial Information

Please describe the type of property the Deceased owned at the time of death (home, vehicle(s), other real property, etc.)_____

Did the Deceased have any checking, savings, or other bank accounts? ☐ Yes ☐ No

If so, were there any beneficiaries on these accounts? Please describe:_____

Is there any of the Decedent's property that you think may cause issues for the estate (i.e., property that is co-owned by siblings, items that have been the cause of family fights, etc.)_____

Did the Deceased have ownership in a business? ☐ Yes ☐ No

If so, please explain: _____

Knowing only what you do today, what would you estimate to be the value of Decedent's estate (i.e., all of his or her property, vehicles, accounts without beneficiaries, etc):_____

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INFORMATION ABOUT THE PROSPECTIVE ADMINISTRATOR

An administrator does the same job as an executor (pays bills, finds out information about the estate, speaks on behalf of the person who died, and passes on assets and information to the next of kin. The administrator can either serve INDEPENDENTLY (i.e., with little court supervision because all heirs have agreed on this person) or DEPENDENTLY (with lots of court supervision if the heirs cannot agree). It is less expensive and faster to have an administrator who can serve independently. If you know the heirs will not agree on one person serving in this role, it may be best for you to find a neutral person that everyone in the family can trust to do this job. The administrator does not need to be a person who is inheriting or who is related to the person who died. He or she just needs to be trusted by all of the heirs to act fairly to wrap up the Deceased's final affairs.

What is the full name of the person wanting to serve as administrator: _____

What is that person's physical address: _____

What are the last **3 digits** of that person's social security number: _____

What are the last **3 digits** of that person's driver's license number: _____

How is this person related to the Deceased (if at all): _____

Have (or will) all of the heirs of the Deceased agreed that this person be appointed as the administrator of the estate? ☐ Yes ☐ No

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ADDITIONAL INFORMATION

Some counties require us to provide the names and phone numbers of two disinterested witnesses (i.e. two people who are not inheriting anything and can verify that all the information we provide about the Deceased's life and family are correct). Please list two references below: _____

Are there any other issues about the Deceased's life or estate that you think may cause issues or that need to be discussed now? _____
