

**INTAKE FORM - DECEDENT'S ESTATE**

**Date:** \_\_\_\_\_

<b><i>Decedent:</i></b>	Age:	Probate No.
Residence Address:	Date of Death:	SSN:
Mailing Address:	Date of Birth:	County where domiciled:
Place of Death:	Date of Will:	

<b><i>Client (PR or Administrator):</i></b>	SSN:
Address:	Phone (home): Phone (work):
Relationship to Decedent:	Email:

<b><i>Petitioner (if different):</i></b>	
Address:	Phone (home): Phone (work):
Interest of Petitioner:	Email:

<b><i>Nature of Assets and estimate of total value</i></b>
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Required Information

Y      Has the fiduciary been convicted of a felony? If so explain on a separate page.  
 N

Y      Is the proposed fiduciary a minor; incompetent; a funeral director; or a lawyer  
 N      who has been disbarred or suspended, or resigned under investigation of  
charges of professional misconduct?

Y      Does any person allege that **a)** a will exists that is not alleged in the petition,  
 N      **b)** the decedent's will is ineffective, or **c)** the decedent agreed, promised or  
represented to make, not make, revoke, or not revoke a will or devise?

Decedent's Heirs:

Name	Relationship	Address	Phone

Decedent's Devisees:

Name	Relationship	Address	Phone

Case Information:



Focused on what is important to you.

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