

## Checklist: Basic Estate Information

1. Full name or names of decedent:

\_\_\_\_\_

Also known as:

\_\_\_\_\_

a. Address at time of death:

\_\_\_\_\_

\_\_\_\_\_

b. Location of decedent's property if different than above:

\_\_\_\_\_

\_\_\_\_\_

b. Business address at time of death:

\_\_\_\_\_

\_\_\_\_\_

d. Out-of-state residence (place and duration of stay): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Date and place of birth (or date and place of naturalization): \_\_\_\_\_

\_\_\_\_\_

3. Date and place of death (city, county, and state): \_\_\_\_\_

\_\_\_\_\_

4. Marital and family information

a. Name of spouse/registered domestic partner: \_\_\_\_\_

b. Date and place of marriage/registration: \_\_\_\_\_

\_\_\_\_\_

c. Status of spouse/registered domestic partner (living, deceased, conservatee): \_\_\_\_\_

\_\_\_\_\_

d. Children (name and birthplace; if any children legally adopted, attach copy of adoption decree, indicate if child is deceased):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(1) Grandchildren:

\_\_\_\_\_

\_\_\_\_\_

(2) Children of deceased children:

\_\_\_\_\_

\_\_\_\_\_

(3) Other relatives, if no children or issue of deceased children: \_\_\_\_\_

\_\_\_\_\_

e. Prior marriages, if any, of decedent. In each case provide the following:

(1) Name of former spouse: \_\_\_\_\_

(2) Date and court in which marriage terminated; name and number of case, if known: \_\_\_\_\_

\_\_\_\_\_

(3) Attorney of record: \_\_\_\_\_

(4) Location of copy of dissolution judgment: \_\_\_\_\_

(5a) Children by former marriage; name and birthdate of each and whether adopted by decedent's subsequent spouse; place of residence of children, if not with decedent:

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(5b) Other relatives of former spouse, if predeceased:

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(6) If marriage ended by death of spouse, date and place of death:

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5. Nonmarital relationships

a. Name of partner: \_\_\_\_\_

b. Inclusive dates of relationship: \_\_\_\_\_

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c. Partner making any claim? \_\_\_\_\_

d. Oral property agreements? \_\_\_\_\_

Terms: \_\_\_\_\_

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e. If there are written property agreements, attach copies.

6. Personal representative(s), including alternates and successors (name(s), address(es), telephone number(s), social security number(s), and driver's license number(s)):

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7. Location of will (original): \_\_\_\_\_

8. Witnesses to will ((if will not self-proving) names, current addresses, and availability; if unavailable, obtain exemplars of signatures):

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9. Heirs and beneficiaries (name, age, relationship, address, and telephone number)

a. Beneficiaries of will or intestate heirs:

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b. Heirs who are not beneficiaries, including heirs of predeceased spouse, if applicable:

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