BLAKE&PULSIFER™ PLC

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PROBATE/TRUST ADMINISTRATION WORKSHEET

Date:_____ Referred by:_____

Email:_____

I. DECEDENT'S AND FAMILY INFORMATION:

Decedent's Information

Name:_____

Street Address (as of date of death):_____

City, State & Zip:_____

Date of Birth:_____ Date of Death:_____

Place of Death:_____ S/S Number:_____

U.S. Citizen ☐ Yes ☐ No (if no, state citizenship_____)

Decedent's Spouse

Name:_____

Address:_____ City, State & Zip:_____

Date of Birth:_____ Date of Death:_____

S/S Number:_____ Email:_____

U.S. Citizen ☐ Yes ☐ No (if no, state citizenship_____)

Common Children of Decedent and Spouse (attach additional sheets as necessary)

Name:_____ Age:_____

Address:_____ City, State & Zip:_____

S/S Number:_____ Date of Death:_____

Name:_____ Age:_____

Address:_____ City, State & Zip:_____

S/S Number:_____ Date of Death:_____

Name:_____ Age:_____

Address:_____ City, State & Zip:_____

S/S Number:_____ Date of Death:_____

Common Children of Decedent and Spouse (continued)

Name:_____ Age:_____

Address:_____ City, State & Zip:_____

S/S Number:_____ Date of Death:_____

Decedent's Children from Prior Marriage(s) (attach additional sheets as necessary)

Name:_____ Age:_____

Address:_____ City, State & Zip:_____

S/S Number:_____ Date of Death:_____

Name:_____ Age:_____

Address:_____ City, State & Zip:_____

S/S Number:_____ Date of Death:_____

Name:_____ Age:_____

Address:_____ City, State & Zip:_____

S/S Number:_____ Date of Death:_____

II. ESTATE PLANNING DOCUMENTS[1]

Please bring in all estate planning documents executed by the decedent.

Trust

Name of Trust:_____

Successor Trustee information:

Name:_____

Address:_____ City, State & Zip:_____

Telephone No.:_____ Email:_____

S/S Number:_____ U.S. Citizen ☐ Yes ☐ No (if no, state citizenship_____)

Will

Personal Representative information:

Name:_____

Address:_____ City, State & Zip:_____

Telephone No.:_____ Email:_____

S/S Number:_____ U.S. Citizen ☐ Yes ☐ No (if no, state citizenship_____)

Relationship to Decedent:_____

Race:_____ Height:_____ Weight:_____ Eye Color:_____

Hair Color:_____ (needed for probate court application)

[1] Attach copies of all estate planning documents; Provide original Will and Codicils if probate will be filed

III. DECEDENT'S ASSETS:

A. Real Estate[2] (homes, vacation properties, land, farms, deeds of trust, etc.)

Property Address or Location	**Owner(s) and Title** (e.g. T/C[3], JTWROS[4], CPWROS[5], Separate Property, or Other)	**Market Value**	**Mortgages/ Liens**	**Net Value**

B. Life Insurance and Non-Qualified Annuities[6]

Insurer/ Company	**Death Benefit**	**Type of Annuity/Life Insurance**(term, whole, universal, etc.)	**Owner/ Insured**	**Beneficiary**

[2] Attach deeds, if available.
[3] "T/C" means Tenants in Common.
[4] "JTWROS" means Joint Tenancy with Right of Survivorship.
[5] "CPWROS" means Community Property with Right of Survivorship.
[6] Attach most recent statements and policies, if available.

C. Qualified Retirement Plans/IRAs[7] (IRA's, 401k's, other tax deferred retirement accounts)

Financial Institution	Type	Owner	Value	Current Beneficiary

D. Checking, Savings, CDs & Investments[8] (Investment Portfolio, Mutual Funds and Other After-Tax Accounts)

Name of Bank or Financial Institution	Type of Account	Owner(s) and Title (Joint, sole, joint with third party)	Value	Beneficiaries or POD/TOD's (if any)

[7] Attach most recent statements, if available

[8] Attach most recent statements

E. Business Interests[9] (partnerships, LLC's, corporations, and other business interests)

Name of Business	Type (C-Corp, S-Corp, LLC, etc.)	Owner(s) and Title	Percent Owned	Value of Interest Owned

F. Automobiles, Motorcycles, Boats, Aircraft, and RVs[10]

Description	Title	Value	Encumbrance

[9] Attach copies of controlling documents (i.e., Articles, Operating Agreement, Bylaws, Partnership Agreement, Buy/Sell Agreements, etc.)
[10] Attach titles, if available

G. Collectibles & Heirlooms (Art, Goldware, Antiques, Memorabilia, etc. Having Significant Value to a Third Party; Personal Property Having Sentimental or Historical Significance - With or Without Value)

Description	Value

H. Intangible Personal Property[11] (promissory notes, stocks and bonds in certificate form, contracts, cash, etc.)

Description	Owner(s) and Title	Value

I. Gifts to Beneficiaries if such gifts were subject to gift tax.[12]

Gift Made To	Give Made By	Description of Gifted Property	Reason for Gift Description	Date	Value/ Amount

[11] Attach copies if available.
[12] Attach copy of Gift Tax Return

IV. DEBTS OF DECEDENT[13] Bring in any bills received.

Creditor Name:	Account Number:	Dollar Amount:

V. DECEDENT'S ADVISORS/PROFESSIONALS

Name	Type of Advisor (Accountant, Banker, etc.)	Email Address	Phone Number

VI. MISCELLANEOUS

Income Tax Returns[14]

Year last income tax return filed: _____

Was Decedent making quarterly estimated tax payments: ☐ Yes ☐ No

If making quarterly tax payments – provide date of payments and amounts: _____

_____

Was Prior Year's Tax Refund Applied to Current Tax Year: ☐ Yes ☐ No

If Yes – provide amount applied: _____

[13] Attach copies of most recent bills/statements if available

[14] Attach copies of last three years income tax returns

VII. OTHER QUESTIONS OR CONCERNS: