

**VONTZALIDES LAW OFFICES**

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**PROBATE QUESTIONNAIRE**

Decedent's Full Legal Name: \_\_\_\_\_

Was Decedent legally known by any other name? \_\_\_\_\_

Date of Death: \_\_\_\_\_ Decedent's Soc. Security No.: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

Address at time of death: \_\_\_\_\_

Occupation at time of death: \_\_\_\_\_ Employer: \_\_\_\_\_

**CHILDREN**

**Child #1** - Legal Name \_\_\_\_\_ DOB \_\_\_\_\_

Address: \_\_\_\_\_

Tel. No. \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

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**Child #2** - Legal Name \_\_\_\_\_ DOB \_\_\_\_\_

Address: \_\_\_\_\_

Tel. No. \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

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**Child #3** - Legal Name \_\_\_\_\_ DOB \_\_\_\_\_

Address: \_\_\_\_\_

Tel. No. \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

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**Child #4** - Legal Name \_\_\_\_\_ DOB \_\_\_\_\_

Address: \_\_\_\_\_

Tel. No. \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

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ASSET INFORMATION

Please list each asset owned by the Decedent. Identify whether owned in Decedent's name alone (I), jointly with another (including spouse) (J), or by a trust (T).

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**Real Estate**

How held (I, J, or T)	Address of Property	Amount of Any Mortgage	Approximate Value
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____

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**Bank Accounts**

How Held (I, J, or T)	Name of Bank	Type of Account (checking/saving/CD/MM, etc.)	Approximate Value
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

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**IRAs/401K/403B**

Name of Institution	1 <sup>st</sup> Beneficiary	2 <sup>nd</sup> Beneficiary	Approximate Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Life Insurance**

Name of Company	1 <sup>st</sup> Beneficiary	2 <sup>nd</sup> Beneficiary	Death Benefit
_____	_____	_____	\$ _____

\_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_

**Stocks/Bonds/Mutual Funds/Annuities**

How Held (I, J or T)	Name of Company	# of Shares	Approximate Value
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

**Automobiles**

Owner	Year/Make/Model	Any Loan	Approximate Value
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____

**Additional Property with a Value over \$5,000.00**

<u>Description</u>	<u>Approximate Market Value</u>
_____	\$ _____

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

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**Debts and Other Liabilities**

<u>Name of Creditor</u>	<u>Purpose of Debt</u>	<u>Approximate Balance</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

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Gift Tax Returns - If the Decedent filed any federal or state gift tax returns, please either attach them to this form or bring them with you to the conference.

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Names of Decedent's financial advisors:

Accountant \_\_\_\_\_ Phone # \_\_\_\_\_

Broker/Trustee(s)  
or Investment Advisor(s) \_\_\_\_\_ Phone # \_\_\_\_\_

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Name of individual named in Will as executor/Personal Representative (if applicable):

Name: \_\_\_\_\_ Social Security # \_\_\_\_\_  
Address: \_\_\_\_\_