

**PROBATE QUESTIONNAIRE**  
**Please bring in this information at least 10 days prior to appointment**

**For the probate of:** \_\_\_\_\_ **Date of death** \_\_\_\_\_

Appointment date and time: \_\_\_\_\_

Names of persons attending conference: \_\_\_\_\_

Deceased's full legal name, nickname:		
Birthdate:	Place of birth:	SS#:
Surviving spouse full legal name:		
Date of marriage:	Place of marriage:	Phone:
Address:		
Surviving spouse e-mail:		

Personal Representative (full name and nicknames):	
Address (actual and mailing):	Soc. Sec. #
E-mail address:	All Phone #s:
Driver's License: State                      #	Date of Birth:

**CHILDREN:** If predeceased, attach list of names and addresses of their children or grandchildren, birthdates, dates of death, surviving spouse, adopted, etc.

	Husband's only	Wife's only	Both
1. Child's name, nickname:			
Date of birth:	Place of birth:		
Address:			
E-mail address:			
Phone #:	Predeceased: Yes ____ No ____		
Spouse's name:			

	Husband's only	Wife's only	Both
2. Child's name, nickname:			
Date of birth:	Place of birth:		
Address:			
E-mail address:			
Phone #:	Predeceased: Yes ____ No ____		
Spouse's name:			

		Husband's only	Wife's only	Both
3. Child's name, nickname:				
Date of birth:	Place of birth:			
Address:				
E-mail address:				
Phone #:	Predeceased: Yes ____ No ____			
Spouse's name:				

		Husband's only	Wife's only	Both
4. Child's name, nickname:				
Date of birth:	Place of birth:			
Address:				
E-mail address:				
Phone #:	Predeceased: Yes ____ No ____			
Spouse's name:				

		Husband's only	Wife's only	Both
5. Child's name, nickname:				
Date of birth:	Place of birth:			
Address:				
E-mail address:				
Phone #:	Predeceased: Yes ____ No ____			
Spouse's name:				

		Husband's only	Wife's only	Both
6. Child's name, nickname:				
Date of birth:	Place of birth:			
Address:				
E-mail address:				
Phone #:	Predeceased: Yes ____ No ____			
Spouse's name:				

Husband's only      Wife's only      Both

7. Child's name, nickname:				
Date of birth:		Place of birth:		
Address:				
E-mail address:				
Phone #:		Predeceased: Yes ____ No ____		
Spouse's name:				

Personal Representative (full name and nicknames):	
Address (actual and mailing):	
E-mail address:	All Phone #s:
Driver's License: State                  #	Date of Birth:

Heirs other than the children (please note if any are minors), including grandchildren:

Name:	E-mail:
Address:	Date of birth:
Phone:	Minor ____yes, ____no

Name:	E-mail:
Address:	Date of birth:
Phone:	Minor ____yes, ____no

Name:	E-mail:
Address:	Date of birth"
Phone:	Minor ____yes, ____no

Name:	E-mail:
Address:	Date of birth:
Phone:	Minor ____yes, ____no

Name:	E-mail:
Address:	Date of birth:
Phone:	Minor ____yes, ____no

**Please bring or fax this completed questionnaire to our office at least 10 days prior to your appointment.** Be as complete as you can. If something does not apply, write "none". Make a note whether property is community or separate. To complete the probate, we will need exact values as of the date of death, but for now, just list them to the extent known, giving at least approximate values.

The more accurate and complete your information is can determine how fast your probate can be completed. After reviewing the information received, we can more accurately give you the cost of the probate at the time of the appointment. Please be prepared to make payment at that time.

- \_\_\_\_\_ We will need an **original** Will and **original** Codicils. You can send us copies and bring the originals to your appointment.
- \_\_\_\_\_ We need copies of any personal property letters or other writings to be read with the Will.
- \_\_\_\_\_ Death Certificate
- \_\_\_\_\_ Copy of Deeds for all real property, whether in or outside of Idaho (not the assessor's notice), with approximate values of each. If you haven't found the deeds yet, make a list of all properties with their approximate value.
- \_\_\_\_\_ Copy of statements for all bank accounts, stocks, bonds, CDs etc. showing balances on the actual date of death.
- \_\_\_\_\_ Copy of all titles for cars, motorcycles, manufactured homes, ATVs, motorhomes, or any other recreational vehicles, and approximate values of each. If you haven't found the titles yet, make a list of the items.
- \_\_\_\_\_ List of any unusually valuable items or collections with approximate values.
- \_\_\_\_\_ List of any unpaid debts, including mortgages, including creditor, account numbers, and amount due, known to you at this time.
- \_\_\_\_\_ Copy of any Trust, including amendments and attachments, with list of and values of assets held by the Trust.
- \_\_\_\_\_ Copy of the face page and the beneficiary page of all Life Insurance policies, IRA's, Annuities, SEP's, 401(K)'s, with approximate values.
- \_\_\_\_\_ Copy of any Community Property Agreement, Devolution Agreement, Pre-Nuptial, or Post-Nuptial Agreement, if there is one.

To make sure you get all your questions answered, it would be helpful to make a list of any questions you may have and bring them to your appointment. Thank you for calling our office.

**Robert L. Aldridge, Chartered**

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For a map with directions, see our web site at [RLAldridgeLaw.com](http://RLAldridgeLaw.com)