



# GOODMANLAW<sup>SM</sup>

Advice, Assistance, Alacrity

Home About Us **FREE** Arizona Clients Find It Search Site Contact Us  
Download **FREE** Forms

[www.goodmanlaw.com](http://www.goodmanlaw.com)

[info@goodmanlaw.com](mailto:info@goodmanlaw.com)

## PROBATE QUESTIONNAIRE

### GOODMAN LAW FIRM, P.C.

Today's Date: \_\_\_ / \_\_\_ / \_\_\_

Intake Atty: \_\_\_\_\_

Decedent's Full Legal Name: \_\_\_\_\_ Date of death: \_\_\_\_\_

Spouse's Name \_\_\_\_\_ Decedent's Social Security Number: \_\_\_\_\_

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

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

Relationship of client to decedent: \_\_\_\_\_

Person nominated in Will to be Personal Representative: \_\_\_\_\_

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Last Will & Testament (Original)           | <input type="checkbox"/> Death certificate  | <input type="checkbox"/> Deed to all real estate     |
| <input type="checkbox"/> List of heirs (names, addresses & SSN)     | <input type="checkbox"/> Trust documents    | <input type="checkbox"/> Signed fee agreement        |
| <input type="checkbox"/> Retainer                                   | <input type="checkbox"/> LLC/Corp documents | <input type="checkbox"/> All insurance policies      |
| <input type="checkbox"/> List of all financial institution accounts |   | <input type="checkbox"/> Title to all motor vehicles |
| <input type="checkbox"/> List of all stocks, bonds, IRAs, 401K      |   | <input type="checkbox"/> List of creditors           |

### REAL PROPERTY

<u>Description</u>	<u>Market Value</u>	<u>Amt. of Encumbrances</u>
--------------------	---------------------	-----------------------------

---



---



---

### VEHICLES

(Cars, Boats, Trailers, Motorcycles, Motor homes, Airplanes, etc.)

<u>Description</u>	<u>Market Value</u>	<u>Amt. of Encumbrances</u>
--------------------	---------------------	-----------------------------

---



---



---

**CASH AND DEPOSIT ACCOUNTS**

(Banks, Savings & Loans, Credit Unions, Savings, Checking, Certificates of Deposit, Money Market Accounts, etc.)

Description & Account No. Value

---

---

---

**STOCKS AND BONDS**

Description Market Value Amt. of Encumbrances

---

---

---

**LIFE INSURANCE**

Description Face Value Cash Value  
Against Policy Amt. of Loans

---

---

---

**PENSIONS, PROFIT SHARING, RETIREMENT ACCOUNTS, ANNUITIES**

Description Estimated Value Encumbrances

---

---

---

**BUSINESS INTERESTS**

(Partnerships, Corporations, etc.)

Description Estimated Value Encumbrances

---

---

---

**ACCOUNTS RECEIVABLE**  
(Notes, Contracts, Mortgages, Debts)

Description Gross Value

---

---

**HOUSEHOLD FURNITURE, FURNISHINGS, APPLIANCES**

Description Gross Value

---

---

**PROPERTY WITH INTRINSIC OR ARTISTIC VALUE**  
(Art Objects, Paintings, Antiques, Rare Books, Coins, Stamps, Jewelry, Heirlooms, etc.)

Description Market Value Amt. of Encumbrances

---

---

**OTHER PROPERTY OF VALUE OVER \$50.00**  
(Televisions, Cameras, Stereos, Radios, China, Silver, Lawnmowers, Barbecues, Recreational Equipment, etc.)

Description Market Value Amt. of Encumbrances

**DEBTS & OTHER LIABILITIES**

<u>Name of Creditor</u>	<u>Present Balance</u>	<u>Purpose of Debt</u>	<u>Security for Debt, if any</u>
-------------------------	----------------------------	----------------------------	--------------------------------------

---

---

---

---

**CHILDREN**  
(Natural or Adopted)

<u>Name</u>	<u>Date of Birth</u>	<u>Address</u>
-------------	----------------------	----------------

---

---

---

---

**BROTHERS & SISTERS**  
(Natural or Adopted)

<u>Name</u>	<u>Date of Birth</u>	<u>Address</u>
-------------	----------------------	----------------

---

---

---

**CERTIFICATION**

By my signature below, I certify that all of the information herein is true and correct to the best of my knowledge.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Signature

c:\documents and settings\mark n. goodman\my documents\1-data\1-a-work\probate inquiry.doc