

EVANS & DAVIS

Confidential

# Probate Intake Form



## Dear Client,

Please accept our condolences for the loss of your loved one. We recognize this is a difficult time and we appreciate you placing your trust in our Firm and for allowing our attorneys to assist your family.

Please complete the attached Probate Intake Form as thoroughly as possible. The information you provide allows us to assess your specific needs and properly assist you.

Once you have completed the form, please return it to our office via mail, e-mail, or facsimile. If you have not done so already, please schedule an appointment with our Firm to review your specific information. You may contact us at our toll free number at (866) 708-2335 or by e-mail at [attorneys@evansdavis.com](mailto:attorneys@evansdavis.com). Please return the completed form at least three (3) business days prior to your scheduled meeting.

Please note that all information you share with our Firm will remain confidential and is privileged attorney/client communication. If you have questions or concerns, please do not hesitate to contact us at any time.

Warm Regards,  
Evans & Davis

# EVANS & DAVIS

Confidential Probate Intake Form

Personal and Confidential

## Client Information

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Email: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_ Fax Phone: \_\_\_\_\_

Who referred you to Evans & Davis? \_\_\_\_\_

## Decedent's Information

Full Name (First/Middle/Last): \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Date of Death: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Place of Death: \_\_\_\_\_

Was the Decedent married at the time of death? (Y/N) \_\_\_\_\_

Spouse's Name	Date of Marriage	Date of Divorce/Death
_____	_____	_____
_____	_____	_____

At the time of death, did the Decedent have a Will? (Y/N) \_\_\_\_\_

*If yes, please provide the original or a copy of the Decedent's Death Certificate.*

If yes, was the Will probated? (Y/N) \_\_\_\_\_

Place of Residence: \_\_\_\_\_



## Decedent's Children

If the Decedent had children, natural or adopted, please list the following information. It is critical that you list all children regardless of the situation or relationship, including any children given up for adoption or for which parental rights have been terminated.

Name:	Date of Birth:	Gender:	Adopted: (Y/N):
Social Security Number:	Current Address:		
Date of Death (if applicable):	If deceased, please provide the names of any living children*:		

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Name:	Date of Birth:	Gender:	Adopted: (Y/N):
Social Security Number:	Current Address:		
Date of Death (if applicable):	If deceased, please provide the names of any living children*:		

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Name:	Date of Birth:	Gender:	Adopted: (Y/N):
Social Security Number:	Current Address:		
Date of Death (if applicable):	If deceased, please provide the names of any living children*:		

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Name:	Date of Birth:	Gender:	Adopted: (Y/N):
Social Security Number:	Current Address:		
Date of Death (if applicable):	If deceased, please provide the names of any living children*:		

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**\*Including any children given up for adoption or for which parental rights have been terminated.**



## Personal Representative Information

Please provide the following information of the intended Personal Representative:

Full Name:	Age:	Relation to Decedent:
Street Address:	City:	
State:	Zip Code:	Email:
Home Phone:	Cell Phone:	Work Phone:

## Beneficiary Information

Please list all individuals and/or charities that are listed to receive under any will. If there are more beneficiaries than will fit on this page, you may add an additional page or add to the Notes section at the end.

Full Name:	DOB:	Relation to Decedent:
Social Security Number:	Percentage to Receive:	
Street Address:	City:	
State:	Country:	Zip Code:

Full Name:	DOB:	Relation to Decedent:
Social Security Number:	Percentage to Receive:	
Street Address:	City:	
State:	Country:	Zip Code:

Full Name:	DOB:	Relation to Decedent:
Social Security Number:	Percentage to Receive:	
Street Address:	City:	
State:	Country:	Zip Code:

Full Name:	DOB:	Relation to Decedent:
Social Security Number:	Percentage to Receive:	
Street Address:	City:	
State:	Country:	Zip Code:



## Financial and Investment Accounts

Please list all financial and investment accounts that were owned by the Decedent at the time of their death. Under Account Type specify cash, checking, savings, money market, mutual fund, brokerage account, securities (stocks & bonds), certificate of deposit (CD), etc. Please provide a recent statement from each account.

1. Name of Financial Institution: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_  
Owner(s): \_\_\_\_\_  
Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_ Beneficiaries: \_\_\_\_\_

2. Name of Financial Institution: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_  
Owner(s): \_\_\_\_\_  
Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_ Beneficiaries: \_\_\_\_\_

3. Name of Financial Institution: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_  
Owner(s): \_\_\_\_\_  
Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_ Beneficiaries: \_\_\_\_\_

4. Name of Financial Institution: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_  
Owner(s): \_\_\_\_\_  
Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_ Beneficiaries: \_\_\_\_\_



# Retirement Benefit Accounts

Please list all of Decedent's retirement accounts: 401(k), IRA, Profit Sharing, Thrift Savings, etc.

1. Company: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_  
Beneficiaries: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_

2. Company: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_  
Beneficiaries: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_

3. Company: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_  
Beneficiaries: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_

4. Company: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_  
Beneficiaries: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_



# Retirement Benefit Accounts (Continued)

## Pension Plans

1. Company: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Does the plan terminate at the death of the beneficiary? Yes  No   
Approximate Value: \_\_\_\_\_

2. Company: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Does the plan terminate at the death of the beneficiary? Yes  No   
Approximate Value: \_\_\_\_\_

3. Company: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Does the plan terminate at the death of the beneficiary? Yes  No   
Approximate Value: \_\_\_\_\_

## Stocks and Bonds

### Stocks

1. Company: \_\_\_\_\_ Number of shares: \_\_\_\_\_  
Date Issued: \_\_\_\_\_ Book entry of certificate form: \_\_\_\_\_  
Certificate No. if in certificate form: \_\_\_\_\_ Account No. if in book entry form: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_  
Type of ownership: \_\_\_\_\_ Approximate Value: \_\_\_\_\_

2. Company: \_\_\_\_\_ Number of shares: \_\_\_\_\_  
Date Issued: \_\_\_\_\_ Book entry of certificate form: \_\_\_\_\_  
Certificate No. if in certificate form: \_\_\_\_\_ Account No. if in book entry form: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_  
Type of ownership: \_\_\_\_\_ Approximate Value: \_\_\_\_\_

3. Company: \_\_\_\_\_ Number of shares: \_\_\_\_\_  
Date Issued: \_\_\_\_\_ Book entry of certificate form: \_\_\_\_\_  
Certificate No. if in certificate form: \_\_\_\_\_ Account No. if in book entry form: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_  
Type of ownership: \_\_\_\_\_ Approximate Value: \_\_\_\_\_





# Stocks and Bonds (Continued)

## Bonds

Please provide a copy of each bond.

1.	Date the bonds were issued: _____	Type of bond: _____
	How is the bond held? (jointly, payable on death, etc.) _____	
	Maturity date: _____	Redemption value: _____
2.	Date the bonds were issued: _____	Type of bond: _____
	How is the bond held? (jointly, payable on death, etc.) _____	
	Maturity date: _____	Redemption value: _____
3.	Date the bonds were issued: _____	Type of bond: _____
	How is the bond held? (jointly, payable on death, etc.) _____	
	Maturity date: _____	Redemption value: _____
4.	Date the bonds were issued: _____	Type of bond: _____
	How is the bond held? (jointly, payable on death, etc.) _____	
	Maturity date: _____	Redemption value: _____

List any additional information on work/retirement related accounts:

\_\_\_\_\_

\_\_\_\_\_

## Gift Tax Return

Did the Decedent ever file a federal gift tax return?

Yes  No

*If yes, please provide a copy of all relevant documents*



# Real Estate

Please list all real estate that was owned by Trust or Decedent's name at the time of death.

*This will include residences, rental property, time shares, vacant land, oil and other mineral interests, etc. If you have a copy of the deed, please provide that as well.*

1. Type: (Residence, rental, time share, vacant land, oil, and other mineral interests)  
Address/Location & Country:  
Owner(s):  
Current Value: \$ Outstanding Mortgage: \$  
Is the current value based off of an appraisal or the county assessor?

2. Type: (Residence, rental, time share, vacant land, oil, and other mineral interests)  
Address/Location & Country:  
Owner(s):  
Current Value: \$ Outstanding Mortgage: \$  
Is the current value based off of an appraisal or the county assessor?

3. Type: (Residence, rental, time share, vacant land, oil, and other mineral interests)  
Address/Location & Country:  
Owner(s):  
Current Value: \$ Outstanding Mortgage: \$  
Is the current value based off of an appraisal or the county assessor?

4. Type: (Residence, rental, time share, vacant land, oil, and other mineral interests)  
Address/Location & Country:  
Owner(s):  
Current Value: \$ Outstanding Mortgage: \$  
Is the current value based off of an appraisal or the county assessor?



# Tangible Personal Property

List jewelry, artwork, furs, antiques, gold, silver, or other valuable coins, cars, boats, etc.

*Please list all tangible personal property that Decedent owned at the time of death valued individually over \$5,000.00.*

1. Description: \_\_\_\_\_  
Ownership (Individual/Joint/Trust): \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_ Has the item been appraised?: (Y/N) \_\_\_\_\_  
Appraised Value: \$ \_\_\_\_\_ Current location of item: \_\_\_\_\_

2. Description: \_\_\_\_\_  
Ownership (Individual/Joint/Trust): \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_ Has the item been appraised?: (Y/N) \_\_\_\_\_  
Appraised Value: \$ \_\_\_\_\_ Current location of item: \_\_\_\_\_

3. Description: \_\_\_\_\_  
Ownership (Individual/Joint/Trust): \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_ Has the item been appraised?: (Y/N) \_\_\_\_\_  
Appraised Value: \$ \_\_\_\_\_ Current location of item: \_\_\_\_\_

4. Description: \_\_\_\_\_  
Ownership (Individual/Joint/Trust): \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_ Has the item been appraised?: (Y/N) \_\_\_\_\_  
Appraised Value: \$ \_\_\_\_\_ Current location of item: \_\_\_\_\_

List any additional information regarding assets/etc. and include any copies of documents with the estimated value of each item (patent rights, copyrights, contract rights, etc.):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## Decedent's Life Insurance Policies

Please provide the following information for all of Decedent's insurance policies. Also, please provide the policy documentation to us as well.

### Policy No. 1

Life Insurance Company: \_\_\_\_\_

Account No.: \_\_\_\_\_

Owner of Policy: \_\_\_\_\_

Insured: \_\_\_\_\_

Beneficiaries: \_\_\_\_\_

Type of Policy:      Term       Whole/Universal

Accidental/Travel

Death Benefit: \$ \_\_\_\_\_

Cash Value: \$ \_\_\_\_\_

Is there any loan against the policy? (Y/N) \_\_\_\_\_

If "yes", how much? \$ \_\_\_\_\_

### Policy No. 2

Life Insurance Company: \_\_\_\_\_

Account No.: \_\_\_\_\_

Owner of Policy: \_\_\_\_\_

Insured: \_\_\_\_\_

Beneficiaries: \_\_\_\_\_

Type of Policy:      Term       Whole/Universal

Accidental/Travel

Death Benefit: \$ \_\_\_\_\_

Cash Value: \$ \_\_\_\_\_

Is there any loan against the policy? (Y/N) \_\_\_\_\_

If "yes", how much? \$ \_\_\_\_\_

### Policy No. 3

Life Insurance Company: \_\_\_\_\_

Account No.: \_\_\_\_\_

Owner of Policy: \_\_\_\_\_

Insured: \_\_\_\_\_

Beneficiaries: \_\_\_\_\_

Type of Policy:      Term       Whole/Universal

Accidental/Travel

Death Benefit: \$ \_\_\_\_\_

Cash Value: \$ \_\_\_\_\_

Is there any loan against the policy? (Y/N) \_\_\_\_\_

If "yes", how much? \$ \_\_\_\_\_



## Decedent's Advisors

Please provide the following information for all of Decedent's advisors.

### Personal Attorney:

Firm Name: \_\_\_\_\_

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

Phone: \_\_\_\_\_

### Financial Planner:

Company Name: \_\_\_\_\_

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

Phone: \_\_\_\_\_

### Accountant:

Company Name: \_\_\_\_\_

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

Phone: \_\_\_\_\_

### Funeral Home:

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

Phone: \_\_\_\_\_





# Notes Continued

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*Home office &  
mailing address*

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