THE NARROWS
LAW GROUP

PROBATE QUESTIONNAIRE

Thank you for contacting The Narrows Law Group. Please accept our sincere condolences on your loss. We know this is a difficult time. This questionnaire will be helpful for organizing your thoughts prior to our appointment. Please fill it out as well as you can, either skipping or placing question marks next to those items that seem inapplicable or about which you have questions or simply don't know the answer. Use full legal names (first, middle and last). Please attach additional sheets if necessary.

PERSONAL INFORMATION

A. About You

Full Legal Name	
Relation to Decedent	
Address	
Phone #	
Email Address	
Social Security Number	
Birthdate	

B. About the Decedent

Full Legal Name	
Date of Birth	
Date of Death	
Address on Date of Death	
Social Security Number	
Marital Status on Date of Death	
Name of Spouse, if applicable	
Date of Spouse's Death	
Did the Decedent have a Will?	YES ☐ *(If yes, please bring to our meeting)* NO ☐

BENEFICIARY INFORMATION

If there is a Will, please provide information of the beneficiaries listed in the Will. If there is no Will, please provide information for the If no will, please list the next of kin (parents, siblings, spouse, and children). Attach additional pages if necessary.

Beneficiary #1	
Name	
Relationship to Decedent	
Mailing Address	
Phone Number	
Email Address	
Date of Birth *If you don't know, is beneficiary over 18?*	

Beneficiary #2	
Name	
Relationship to Decedent	
Mailing Address	
Phone Number	
Email Address	
Date of Birth *If you don't know, is beneficiary over 18?*	

Beneficiary #3	
Name	
Relationship to Decedent	
Mailing Address	
Phone Number	
Email Address	
Date of Birth *If you don't know, is beneficiary over 18?*	

Beneficiary #4	
Name	
Relationship to Decedent	
Mailing Address	
Phone Number	
Email Address	
Date of Birth *If you don't know, is beneficiary over 18?*	

ASSETS AND DEBTS OF THE DECEDENT

A. Real Property

Address	
Other Owners?	
Is there a mortgage or other debt on property?	YES ☐ NO ☐ DON'T KNOW☐

Address	
Other Owners?	
Is there a mortgage or other debt on property?	YES ☐ NO ☐ DON'T KNOW☐

Address	
Other Others?	
Is there a mortgage or other debt on property?	YES ☐ NO ☐ DON'T KNOW☐

B. Financial Accounts

Institution	Type of Account	Balance (estimate is fine)	Other owner(s)?	Beneficiary designated?

C. **Retirement Accounts**

Institution	Type of Account	Balance (estimate is fine)	Beneficiary designated?

D. **Life Insurance**

Institution	Death Benefit (estimate is fine)	Beneficiary designated?

E. **Vehicles/Boats/Etc.**

Make	Model	Year	Other Owner(s?)	Guess on Value (Kelley Blue Book)	Debt?

F. **Personal Property –** the Decedent's stuff.

Is there a lot of personal property (stuff) to deal with?

YES ☐ NO ☐ DON'T KNOW ☐

Has any personal property been distributed or removed from the Decedent's property?

YES ☐ NO ☐ DON'T KNOW ☐

Are you worried about the Decedent's stuff for any reason?

YES ☐ NO ☐ DON'T KNOW ☐

Do you think the Decedent's stuff has significant value?

YES ☐ NO ☐ DON'T KNOW ☐

G. Guns.

Did the Decedent own any guns? YES ☐ NO ☐ DON'T KNOW ☐

If yes, are the guns secured and where are they located currently? ________________________________

H. Debts – please tell us about any debts that you know about at this point:

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MISCELLANEOUS

Please share any other information that you think might be relevant to the probate:

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ATTORNEY NOTES:

TO-DOS AFTER INITIAL MEETING WITH ATTORNEY

ATTORNEY TO-DOS:

CLIENT TO-DOS:

PARALEGAL TO-DOS: