

**ESTATE CLIENT INTAKE FORM**

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Decedent's Name: \_\_\_\_\_

Date of Death: \_\_\_\_\_ Decedent's Date of Birth \_\_\_\_\_

Client's Name: \_\_\_\_\_

Client's Address: \_\_\_\_\_

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Client's Telephone #: \_\_\_\_\_ Alternate Number \_\_\_\_\_

Client's Email: \_\_\_\_\_

Personal Representative's Social Security #: \_\_\_\_\_

Obtain names, addresses, ages, relationships and social security numbers of all heirs and devisees (interested parties)

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1. Does the family need assistance with funeral arrangements?

a) Social Security Lump Sum Payment

2. Determine Venue: \_\_\_\_\_

3. a) Lodging of Will: \_\_\_\_\_ No Will \_\_\_\_\_  
Obtain original of will \_\_\_\_\_ Written Memorandum \_\_\_\_\_

b) Determine who should receive copies of the will

c) Obtain certified copy of death certificate

4. Discussion of Formal vs. Informal Probate  
(Small Estate Affidavit?)
5. Discussion of Claims Denied and newspaper notice
6. List of all investments (discuss liquidation vs.  
Distribution and personal representative liability)
7. Copies of Life Insurance Policies
8. Discussion of income taxes - who to prepare, request copies of  
last 3 years; Discussion of 706 and/or 709, if necessary
9. Bank accounts and CD's (Discuss waiver of penalty on time  
certificates)
10. Real Estate
  - a) Status of current residence of decedent - obtain copy of  
deed or request O&E
  - b) Any real estate in other states?
  - c) Add PR as an additional insured on homeowners policy  
if necessary (vacancy?)
11. Status of any automobiles; name PR as an additional insured on  
insurance policy if necessary
12. Discuss distribution, liquidation of personal property

13. Did the decedent own a business?
14. Discuss opening estate account, accounting and fiduciary responsibilities (sending us monthly statements)
15. Discuss taxation of IRAs and Annuities (60 days on annuities)
16. Personal Representative Fee
17. Attorney Fees
18. Social Security and Pension checks
19. Discuss Basis Issues (Probate and Non-Probate).
20. Discuss handling of decedent's credit cards.
21. Discuss changes of addresses.
22. Discuss access to safe deposit boxes (3d party witness).
23. Is there a Marital Agreement? \_\_\_\_\_  
If so,
  - a. Rights at death
  - b. Rights in divorce
  - c. Rights during marriage
  - d. Rights to children by previous marriage