

AGR LAW

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PROBATE INTAKE FORM

Your Name: Albert G. Reese, Jr., Esq. Client Name: _____

PERSONAL INFORMATION

Your Legal Name _____
Prefer to be called _____ Birth date _____ SS# _____
US Citizen? ___ Yes ___ No. If No provide status. _____
Home Address _____ City _____ State _____ Zip _____
County of Residence _____ Home Telephone _____ Cellphone _____
Social Security #: _____
E-mail Address _____ It is okay to communicate with me via E-mail.

DECEDENT

Personal Information:

Name(s):

_____ Name as regularly signed (E.g. name on checks)	_____ Name(s) as appears on assets (house, stocks, bonds, savings accounts, etc)
Date of Death: _____	Social Security #: _____
Residence Address: _____	County: _____
City/State/Zip: _____	Mailing Address: _____ (if different than above)
Date of Birth: _____	

Marital Status:

___ Single (never married)

___ Married; Date of Marriage: _____

___ Divorced; Date: _____. Full name of prior spouse: _____

___ Widowed; Date: _____. Full name of deceased spouse: _____

Date of Will: _____ **Date of Codicil(s) (if applicable):** _____

Heir(s) to Estate:

Name: _____

Address: _____

Phone: _____

SSN: _____

DOB: _____ Age: _____

Email: _____

Relationship to Deceased: _____

Heir(s) to Estate:

Name: _____

Address: _____

Phone: _____

SSN: _____

DOB: _____ Age: _____

Email: _____

Relationship to Deceased: _____

Heir(s) to Estate:

Name: _____

Address: _____

Phone: _____

SSN: _____

DOB: _____ Age: _____

Email: _____

Relationship to Deceased: _____

Heir(s) to Estate:

Name: _____

Address: _____

Phone: _____

SSN: _____

DOB: _____ Age: _____

Email: _____

Relationship to Deceased: _____

PERSONAL REPRESENTATIVE(S)

Personal Representative(s),

Name(s): _____

Address: _____

City/State/Zip: _____

Phone: _____

Email: _____

Why should this person be the Personal Representative?

Nomination by the will

Statutory Priority

Other (explain): _____

REAL ESTATE.

2.1 Did the decedent own any real property at the time of death? _____ Yes _____ No.

ATTACHMENTS (Please provide the following)

15.1 DECEDENT'S ORIGINAL WILL, ALL CODICILS AND TRUST DOCUMENTS

15.2 If the value of the decedent's estate is more than \$5,000,000.00, provide the decedent's last three years bank statements with canceled checks and deposits.