

**PROBATE INFORMATION SHEET**

Name(s): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Addresses and phone numbers (including zip code):

Phone: (wk) \_\_\_\_\_ (hm) \_\_\_\_\_ (spouse wk) \_\_\_\_\_

Phone: (wk) \_\_\_\_\_ (hm) \_\_\_\_\_ (spouse wk) \_\_\_\_\_

Phone: (wk) \_\_\_\_\_ (hm) \_\_\_\_\_ (spouse wk) \_\_\_\_\_

Party concerned about (Full Name):

\_\_\_\_\_

Date of Birth: \_\_\_\_\_ SSN: \_\_\_\_\_

Residence: \_\_\_\_\_

Employment: \_\_\_\_\_

Does party have a Last Will and Testament? \_\_\_\_\_ Living Will/Directive ? \_\_\_\_\_  
Medical Power of Attorney? \_\_\_\_\_ Durable Power of Attorney? \_\_\_\_\_

Marital History:

Full name of spouse \_\_\_\_\_

still living \_\_\_\_\_ deceased \_\_\_\_\_ divorced \_\_\_\_\_

Prior Marriages: \_\_\_\_\_  
\_\_\_\_\_

Children (if any)

Ages

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

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

Assets of Estate:

Real Estate \_\_\_\_\_

Automobiles \_\_\_\_\_

Stocks and Bonds \_\_\_\_\_

Cash \_\_\_\_\_

Bank Accounts \_\_\_\_\_

Personal Property \_\_\_\_\_

Approximate Value of the Estate: \_\_\_\_\_