

Probate Worksheet

VAUGHN, WINTON & CLARK ^{PLLC}

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Probate Information Worksheet

Client's Name: _____

Street Address

City State ZIP

Preferred Email Address Preferred Phone Number

Decedent's Full Name: _____

Social Security Number Date of Death Age at Date of Death

Street Address at Date of Death

City State ZIP Year Established

Date of Birth City & State of Birth

Occupation

Decedent's Spouse's Name: _____

Date of Death Social Security Number

Street Address

City State ZIP

Preferred Email Address Preferred Phone Number

Funeral Arrangements

Funeral Director's Name & Street Address

City

State

ZIP

Cost of Funeral

Other Information

Accountant's Name & Street Address

City

State

ZIP

Email Address

Phone Number

Attorney's Name & Street Address

City

State

ZIP

Email Address

Phone Number

Location of Safe Deposit Box(es)

Keys

Names of Those Who Have Access Authority

Will

Location of Original

Date

Self-proving Clause

Name & Address of Witness

Name & Address of Witness

Notary Name

Preparing Attorney's Name & Address

Email Address

Phone Number

Executor/Administrator's Name: _____

Named in Will

Social Security Number

Street Address

City

State

ZIP

Preferred Email Address

Preferred Phone Number

Assets at Death

Attach additional pages where necessary.

Cash on Hand on Date of Death

Provide a statement that includes the date of death for the purpose of date of death valuation.

Name of Bank City, State

Account Number Account Balance on Date of Death

Name of Bank City, State

Account Number Account Balance on Date of Death

Name of Bank City, State

Account Number Account Balance on Date of Death

Real Estate Owned (Provide deeds):

Address County State Ownership

Address County State Ownership

Address County State Ownership

Mineral (Oil, Gas, etc.) Interests (Provide deeds):

Legal Description/County, State Ownership
Producing Non-producing

Legal Description/County, State Ownership
Producing Non-producing

Stocks (Provide all stock certificates):

Company	Number of Shares	Value on Date of Death	Location of Cert.
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Company	Number of Shares	Value on Date of Death	Location of Cert.
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Company	Number of Shares	Value on Date of Death	Location of Cert.
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Bonds:

Company	Bond Number	Face Amount	Location of Bond
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Company	Bond Number	Face Amount	Location of Bond
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Promissory Notes, Loans, and Mortgages (Provide copy of document evidencing money owed to the deceased.):

Debtor's Name, Address & Relation to Deceased	Unpaid Balance at Death
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Debtor's Name, Address & Relation to Deceased	Unpaid Balance at Death
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Debtor's Name, Address & Relation to Deceased	Unpaid Balance at Death
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Vehicles (Provide copy of title):

Year/Make/Model	Fair Market Value
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Year/Make/Model	Fair Market Value
-----------------	-------------------

Year/Make/Model	Fair Market Value
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**Corporations, Limited Liability Companies, Partnerships, and Sole Proprietorships
(Provide copy of organizational and buy/sell documents):**

Name	Ownership Percentage	Fair Market Value
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Name	Ownership Percentage	Fair Market Value
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Life Insurance Policies:

Company	Life Insured	Death Benefit Amount
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Primary Beneficiary	Policy Number
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Secondary Beneficiary

Company	Life Insured	Death Benefit Amount
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Primary Beneficiary	Policy Number
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Secondary Beneficiary

IRAs, 401Ks, Annuities, Qualified Plans, and Other Retirement Accounts

Provide a statement that includes the date of death for the purpose of date of death valuation.

Company	Owner	Account Number	Value
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Primary Beneficiary	Secondary Beneficiary
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Company	Owner	Account Number	Value
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Primary Beneficiary	Secondary Beneficiary
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Liabilities at Death

Attach additional pages where necessary.

Unsecured Creditors:

Creditor's Name and Address	Amount Owed at Death
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Creditor's Name and Address	Amount Owed at Death
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Creditor's Name and Address	Amount Owed at Death
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Notes and Mortgages:

Creditor	Address
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Unpaid Balance	Collateral
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Creditor	Address
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Unpaid Balance	Collateral
----------------	------------

Creditor	Address
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Unpaid Balance	Collateral
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CHECKLIST

- Original Will
- Death Claims Filed with Social Security and/or Veterans Administration
- Death Certificates Ordered
- Copy of Antenuptual Agreement
- Copy of State & Federal Income Tax Returns (Past 3 Years)
- Mineral Leases
- Mineral Production Records
- Change of Address to Royalty Payor/Production Payor/Lease Operator
- Copy of Operating Agreement
- Copy of Partnership Agreement
- Copy of Trust Agreement where Decedent is Beneficiary
- Copy of Lease Agreement
- Copy of Divorce Decree or Settlement Obligations
- Powers of Appointment