



**ESTATE ADMINISTRATION INTAKE INFORMATION**

Name of Deceased: \_\_\_\_\_

Address of Deceased: \_\_\_\_\_

\_\_\_\_\_ County: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Date of Death: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Date of Funeral: \_\_\_\_\_

Name of Funeral Director: \_\_\_\_\_

Is there a Will? \_\_\_\_\_ If yes, who has it? \_\_\_\_\_

Did we prepare the Will? \_\_\_\_\_

Executor's Name: \_\_\_\_\_

Executor's Phone #: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Executor's Email: \_\_\_\_\_

Executor's Address: \_\_\_\_\_

Executor's Name: \_\_\_\_\_

Executor's Phone #: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Executor's Email: \_\_\_\_\_

Executor's Address: \_\_\_\_\_

Executor's Name: \_\_\_\_\_

Executor's Phone #: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Executor's Email: \_\_\_\_\_

Executor's Address: \_\_\_\_\_

\_\_\_\_\_

Marital Status of Decedent at time of death:

\_\_\_\_\_ Single

\_\_\_\_\_ Married – date of marriage and name of surviving spouse \_\_\_\_\_

\_\_\_\_\_ Widow or Widower –date of death and name of deceased spouse \_\_\_\_\_

\_\_\_\_\_ Legally separated – date of separation and name of spouse \_\_\_\_\_

\_\_\_\_\_ Divorced – date divorce decree became final \_\_\_\_\_

Are there any unusual or emergency circumstances? \_\_\_\_\_

Beneficiaries – Names, addresses, social security #s and relationship –

Lock box – Where and how titled: \_\_\_\_\_

Assets – Where and how titled:

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

Vehicles: \_\_\_\_\_

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

Investment Accounts: \_\_\_\_\_

Stocks: \_\_\_\_\_

Bonds: \_\_\_\_\_