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PROBATE QUESTIONAIRE

DATE: _____ NEW CLIENT: _____ MATTER: _____

CLIENT(S) NAME(S): _____

CLIENT(S) HOME ADDRESS (include Zip Code): _____

TELEPHONE: _____ HOME WORK _____

DECEDENT'S BIRTH DATE: _____ SSN: _____

DECEDENT'S NAME(S): _____

DECEDENT'S HOME ADDRESS (include Zip Code): _____

DECEDENT'S BIRTH DATE: _____ SSN: _____

IF DECEDENT DOES NOT HAVE A WILL, PLEASE IDENTIFY CLOSEST LIVING HEIRS (SPOUSE & CHILDREN, PARENTS, SIBLINGS, NIECES & NEPHEWS, UNCLES & AUNTS, THEN COUSINS).

NAME	ADDRESS	RELATIONSHIP
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

PLEASE BRING FOLLOWING DOCUMENTS IF AVAILABLE

1. ORIGINAL WILL OR LOCATION OF ORIGINAL (I.E. SAFE DEPOSIT BOX) (COPY MAY BE SUFFICIENT)
2. CERTIFIED COPY OF DECEDENT'S DEATH CERTIFICATE (ONE WITHOUT CAUSE OF DEATH)
3. COPIES OF DEEDS, TITLES, STOCKS, BONDS, & MOST RECENT FINANCIAL ACCOUNT STATEMENTS.
4. COPIES OF NOTES, MORTGAGES, SECURITY AGREEMENTS, & MOST RECENT CREDIT STATEMENTS.

SUMMARY OF ASSETS

APPROXIMATE VALUE AND NATURE OF ASSETS OWNED BY DECEDENT INDIVIDUALLY OR JOINTLY. As to each asset, indicate form of ownership as "J" (Joint), "I" (Individually), or "UNK" (Unknown). ATTACH SUPPLEMENTAL SHEETS AS NECESSARY.

1. REAL ESTATE: (Indicate J, I, or UK)

Brief Description (indicate county)	Vacant or type of Buildings or Improvements	If mortgaged, approx. amount and date of next payment due	Approx. Market Value

2. STOCKS AND BONDS: (Indicate J, I, or UK)

Name of Company	No. of Shares	Approx. Value	Total Value

3. MORTGAGES AND NOTES RECEIVABLE: (Indicate J, I, or UNK)

Maker	Date	Next Payment date and amount	Approximate balance

4. BANK ACCOUNTS OR CERTIFICATES OF DEPOSIT: (Indicate J, I, or UNK)

Bank & number of account (If joint, name of joint or CD owner)	Checking, Savings	Approximate Balance

5. CASH: (belonging to DECEDENT)

Location	Approximate amount

6. INSURANCE ON DECEDENT'S LIFE:

Company	Policy #	Beneficiary	Location of Original Policy	Expected Proceeds

7. **VEHICLES/VESSELS:** (Indicate J, I, or UNK)

Make	Model Year	Name of Lender	Date & Amount Next Payment	Approximate Balance	Approximate Value
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8. **JEWELRY, ART OBJECTS, ANTIQUES, FURS & OTHER VALUABLE ITEMS:**

Description	Location	Insurance Coverage	Approximate Value
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9. **MISCELLANEOUS OR OTHER PROPERTY NOT DESCRIBED ABOVE:** (Indicate J, I, or UNK)

Description	Location	Approximate Value
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10. **INSURANCE (OTHER THAN LIFE INSURANCE) COVERAGE:** (Indicate J, I, or UNK)

	Company	Policy #	Limits	Paid Through
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Automobile: _____

Homeowners: _____

Other: _____

11. **TRUSTS IN WHICH DECEDENT HAVE ANY INTEREST:** (If available, provide a copy)

Trustee	Address	Trust date	Approx. Asset Amount
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12. **ANNUITIES OR PENSIONS:**

Company	Address	Type	Death Benefit Amount
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13. **TRANSFERS:** (See attached definition on next page)

14. **BUSINESS:** If DECEDENT are engaged actively in the operation of a business, describe the business operation, state whether the business is a sole proprietorship or partnership, DECEDENT'S percentage of ownership, and designate a person to operate the business if it should be someone other than the personal representative named in DECEDENT'S will:

List all business assets and their value, or designate any persons who would be able to provide this information to DECEDENT'S personal representative:

15. Name and address of DECEDENT'S attorney:

Name of Firm: _____ Lawyer: _____
Address: _____
City: _____ State: _____ Zip: _____
Telephone: _____ Client No. _____

16. Name and address of DECEDENT'S insurance agent(s) [life, health]:

Name of Agency: _____ Name of Agent: _____
Address: _____
City: _____ State: _____ Zip: _____
Telephone: _____ Account No.: _____

17. Name and address of DECEDENT'S accountant:

Name of Firm: _____ Accountant: _____
Address: _____
City: _____ State: _____ Zip: _____
Telephone: _____ Client No.: _____

18. Name and address of DECEDENT'S stockbroker:

Name of Brokerage House: _____ Broker: _____
Address: _____
City: _____ State: _____ Zip: _____
Telephone: _____ Account No.: _____

19. MISCELLANEOUS:

TRANSFER OF PROPERTY

Definition: Property transferred by the decedent during his life by trust or otherwise (other than by bona fide sale for an adequate and full consideration in money or money's worth) as follows: (1) Transfers made in contemplation of death if made within 3 years prior to death; (2) transfers intended to take effect in possession or enjoyment at or after the decedent's death; (3) transfers under which the decedent reserved or retained (in whole or in part) the use, possession, rents, or other income, or enjoyment of the transferred property, for his life, or for a period not ascertainable without reference to his death, or for a period of such duration as to evidence an intention that it should extend to his death; including also the reservation or retention of the use, possession, rents, or other income, the actual enjoyment of which was to await the termination of a transferred precedent interest or estate; (4) transfers under which the decedent retained the right either alone or in conjunction with another person or persons, to designate who should possess or enjoy the property or the income therefrom; and (5) transfers under which the enjoyment of the transferred property was subject at decedent's death to a change through the exercise, either by the decedent alone or in conjunction with another person or persons, of a power to alter, amend, revoke, or terminate, or where such a power was relinquished in contemplation of decedent's death.