**LegalWorks**

New Client Questionnaire: Probate Matters

Today’s Date: Place of Interview:

Your Name: Best Phone # :

Date of Birth: Social Security # :

Aliases, Nicknames, Maiden Names:

Current Address: State: Zip:   
  
Length of time at current address: ; Live with whom?

Immediate prior address:

Marital Status: Name of spouse (if applicable):

Names, dates of birth, and addresses of children or next of kin:

If next of kin is not your spouse or children, what is the relationship to you:

Your health (Physical or Medical Issues):

Emotional or Mental Issues:

**ASSETS and OTHER CONSIDERATIONS** (use separate piece of paper if helpful)

1. Describe any real property, including residential property, rental property, undeveloped property, shares of property. Include your ownership percentage, market value, and amount of mortgage/debt associated with the property.
2. Describe (location and value) of stocks, bonds, CDs, pension, and bank accounts.

1. Identify motor vehicles which you own, including the value and associated debt.
2. Identify any personal property of actual monetary or sentimental value, including jewelry, photographs, antiques, furniture and/or electronic equipment.
3. Identify any life insurance policies, including name of company, amount of policy, and designated beneficiaries.
4. What happens to your remains upon your death can be included in your will. Please advise if you would like this to be included.
5. An individual will need to accept responsibility as your executor or executrix (a person who is appointed by you to carry out the terms of your will). Consider who may be appropriate and check with that person to see if he/she would accept that responsibility.
6. Please list all of your existing debt, including home mortgage, credit card, personal loans, etc.

Notes: