

Client's Name: _____

Address: _____

Home Phone: _____

Cell Phone: _____

Email: _____

Preferred form of communication: EMAIL or PAPER MAIL (**Please circle one**)

ESTATE INFORMATION

1 **Decedent's full name and address:** _____

Decedent's Date of Birth: _____

Decedent's Social Security No: _____ - _____ - _____

Age at death: _____

2 **Date and place of death:** _____

3 **Spouse's name:** _____

Spouse's Social Security No: _____ - _____ - _____

Spouse's date of birth: _____

If spouse is deceased, date of death: _____

(please provide a copy of spouse's death certificate)

4 **Last Will and Testament?** _____

Affidavit attached? _____

If not, names and addresses of witnesses:

5 **Was the Decedent on TennCare?** _____

6 **Executor/Administrator:** _____

Address: _____

Social Security No: _____ - _____ - _____

Home Phone: _____

Cell Phone: _____

Employer: _____

Employer Address: _____

Employer Telephone No: _____

7 **Bond waived in Will?** _____

Heirs willing to waive bond? _____

8 Beneficiaries (Indicate if any are under age 18)

NAME	ADDRESS	RELATION	SSN
_____	_____	_____	____ - ____

If minor, date of birth: _____			
_____	_____	_____	____ - ____

If minor, date of birth: _____			
_____	_____	_____	____ - ____

If minor, date of birth: _____			
_____	_____	_____	____ - ____

If minor, date of birth: _____			

LIST ADDITIONAL NAMES AND ADDRESSES ETC. ON BACK

9 Funeral Expenses: _____

10 Liabilities: (Debts owed) _____

11 Has Decedent's final income tax return been filed?
If so, when? _____ (Provide a copy)

PERSONAL PROPERTY

1 Automobile(s) make, model and value:

2 Securities: (i.e. Stocks, bonds)

3 Furniture and furnishings: (Approx. value, any antiques?)

4 Bank Accounts

Bank Name	Acct. No.	Indiv/Joint	Amount
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

5 **Money owed to decedent:** (i.e. loans decedent made to others)

6 **Insurance**

Name	Policy Number	Face Value	Beneficiary
_____	_____	\$ _____	_____
_____	_____	\$ _____	_____

**REAL PROPERTY
JOINTLY HELD**

1 **Property Address:** _____

Value of property: _____

Mortgage owed on property: _____

Mortgage company name and address:

Name of joint holder(s): _____

2 **Property Address:** _____

Value of property: _____

Mortgage owed on property: _____

Mortgage company name and address:

Name of joint holder(s): _____

**REAL PROPERTY
INDIVIDUALLY HELD**

1 **Property Address:** _____

Value of property: _____

Mortgage owed on property: _____

Mortgage company name and address:

2 **Property Address:** _____

Value of property: _____

Mortgage owed on property: _____

Mortgage company name and address:
