

# COOPER, TANIS & COHEN, P.C.

*Attorneys At Law*

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## PROBATE INFORMATION SHEET

### **Self:**

Legal Name \_\_\_\_\_

Address \_\_\_\_\_

County \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### **Deceased:**

Legal Name \_\_\_\_\_

Last Address \_\_\_\_\_

County \_\_\_\_\_

**\*Please provide a certified copy of the Death Certificate.**

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1. Does the deceased have a Will? (If so, please provide the original or state who has possession of the Will. \_\_\_\_\_

2. If the deceased has a Will, who is named as the Personal Representative - person to execute the will of the deceased (Name and Address of the Personal Representative)? \_\_\_\_\_

3. Family Information:

a. Deceased person's spouse's Legal Name, address and birthdate:

\_\_\_\_\_

b. Deceased person's children - Legal Name(s), addresses and Birthdate(s)

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

4. \_\_\_\_\_

\_\_\_\_\_

5. \_\_\_\_\_

\_\_\_\_\_

6. \_\_\_\_\_

\_\_\_\_\_

c. Deceased person's siblings - Legal Name(s), addresses and Birthdate(s)

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

4. \_\_\_\_\_

\_\_\_\_\_

5. \_\_\_\_\_

\_\_\_\_\_

6. \_\_\_\_\_

\_\_\_\_\_

d. Deceased person's grandchildren - Legal Name(s), addresses and Birthdate(s)

(Include name and address of parent or guardian for any grandchildren under age 18 years)

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_  
\_\_\_\_\_

4. \_\_\_\_\_  
\_\_\_\_\_

5. \_\_\_\_\_  
\_\_\_\_\_

6. \_\_\_\_\_  
\_\_\_\_\_

4. Assets - Did the deceased own:

Real Estate? \_\_\_\_\_

Stocks and Bonds? \_\_\_\_\_

Mortgages and Notes? \_\_\_\_\_

Cash? \_\_\_\_\_

Insurance, Annuities, Pension & Profit Sharing Plans? \_\_\_\_\_

Miscellaneous Property? \_\_\_\_\_

5. Debts – Did the deceased have any debts?

Credit Cards \_\_\_\_\_

Loans \_\_\_\_\_

Utilities \_\_\_\_\_

Medical Expenses \_\_\_\_\_

Other \_\_\_\_\_