

**PROBATE INTAKE**

Appointment Date: \_\_\_\_\_

Your Full Name: \_\_\_\_\_ Your e-mail address: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Place of Employment: \_\_\_\_\_ Occupation: \_\_\_\_\_

Address of Employer: \_\_\_\_\_

Driver's License #: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Social Security #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ (required by court ) Sex: M F

Have you ever been convicted of a crime? (If yes, please explain): \_\_\_\_\_

Decedent's Full name: \_\_\_\_\_

Any Other Names for Decedent (AKA): \_\_\_\_\_

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

Decedent's Social Security #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Decedent's DL #: \_\_\_\_\_

Address of Decedent: \_\_\_\_\_ County: \_\_\_\_\_

Where did Decedent pass (city, county, state)?; \_\_\_\_\_

Did decedent have a will? Y N Do you have the original will? Y N

Who is listed as Executor of the Will?: \_\_\_\_\_

Property owned by Decedent:

Home: \_\_\_\_\_ Is there a mortgage?: \_\_\_\_\_

Bank Accts:

Name of Bank: \_\_\_\_\_ checking \_\_\_ savings \_\_\_ Approx Balance: \_\_\_\_\_

Name of Bank: \_\_\_\_\_ checking \_\_\_ savings \_\_\_ Approx Balance: \_\_\_\_\_

Vehicle year, make, model: \_\_\_\_\_ VIN: \_\_\_\_\_

IRAs/401ks/Other Accounts: \_\_\_\_\_

[attach additional pages / documents if necessary ]

**Please bring most recent account statements to your appointment.**

**Name, address, email address & phone # for beneficiaries: They MUST be contacted**

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

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

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

**How Were You Referred to Heritage Law?:** \_\_\_\_\_

**Who Will Be Responsible for Your Account With Us?:** \_\_\_\_\_

**Alternate contact person, to contact in case of an emergency:** (court forms require this information)

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

**OTHER CONCERNS OR COMMENTS WHICH YOU FEEL WILL BE HELPFUL TO THE ATTORNEY:**