

WEBSTER & SCHELLI
A PROFESSIONAL CORPORATION

PLEASE COMPLETE AND DOWNLOAD THIS QUESTIONNAIRE AND BRING IT WITH YOU TO YOUR INITIAL CONSULTATION. PLEASE ALSO BRING A CERTIFIED COPY OF THE DEATH CERTIFICATE AND ANY ORIGINAL ESTATE PLANNING DOCUMENTS YOU MAY HAVE.

PROBATE QUESTIONNAIRE

The Decedent's Information:

Full Name: _____

Date of Birth: _____ Date of Death: _____

Citizenship: _____

Home Address: _____

Prior Marriages: _____ Yes _____ No

The Spouse's information:

Full Name: _____

Date of Birth: _____ Date of Death (if deceased) _____

Citizenship: _____

Date of Marriage: _____

Prior Marriages: _____ Yes _____ No

The Children Names of Children, whether natural or adopted (please indicate living or deceased):

A. Name: _____

Date of Birth: _____ Married (Y or N): _____

Name of Child's Spouse (if any): _____

Address: _____

Grandchildren: _____

The Children – Continued

B. Name: _____

Date of Birth: _____ Married (Y or N): _____

Name of Child's Spouse (if any): _____

Address: _____

Grandchildren: _____

C. Name: _____

Date of Birth: _____ Married (Y or N): _____

Name of Child's Spouse (if any): _____

Address: _____

Grandchildren: _____

D. Name: _____

Date of Birth: _____ Married (Y or N): _____

Name of Child's Spouse (if any): _____

Address: _____

Grandchildren: _____

MISCELLANEOUS INFORMATION:

Did the Decedent have a Will? _____ (yes or no)

Did the Decedent have a Trust? _____ (yes or no)

If the decedent had a Will please bring it with you to the meeting. If the Decedent did not have a will, who would be willing to serve as the Administrator? _____

Alternate: _____

**If the Decedent has no spouse or surviving decedents, please list the decedents
Parents, siblings and next of kin:**

Please bring the deed to any real estate owned by the decedent, automobile titles, investment or bank account statements and a brief inventory of the decedents personal property.