



## Probate/Estate Administration Questionnaire (2020)

Thank you for choosing De la Cruz Law, LLC to assist you with the legal issues involved in administering your loved one's estate. Probate is the legal process through which the Last Will and Testament of a deceased person (decedent) is offered to the county court in which the decedent lived at the time of his or her death. The Personal Representative (Executor) or is the person named in the will to manage the affairs of the estate and distribute the estate assets. An Administrator is the person who is appointed by the court. The purpose of this questionnaire is to gather relevant information about the estate. The questions below will assist us in having the necessary information to begin the process. Your attention to detail in completing this questionnaire will enable us to move quickly in preparing the needed paperwork to file with the court. Should you have any questions, please do not hesitate to ask us at [info@delacruz-law.com](mailto:info@delacruz-law.com). Please send or email us copies of the documents that will be requested by the Court under Section Four.

### 1. Basic Information

**Name \***

**Email \***

**Cell phone \***

**Address \***

**Name of Decedent \***

**Alternative Name of Decedent**

**Decedent's Address \***

**Date of Death \***

**Spouses Name and Address (If Living)**

**Spouses Date of Death (if applicable)**

### 2. Executor or Administrator Information (Person who you want to handle the estate if there is no will)

**Name of Executor/Personal Representative \***

**Address and Phone number of Executor/Personal Representative \***

**Social Security Number of Executor/Personal Representative - This is needed to obtain an EIN for the estate \***

**Name of Co-Executor (if applicable)**

### 3. Family Information

**Was the Decedent survived by any children? \***

Yes  No

**Name of Child, Address, Phone Number, Email and Date of Birth \***

**Name of Child #2 , Address, Phone Number, Email and Date of Birth**

**Name of Child #3 , Address, Phone Number, Email and Date of Birth**

**Name of Child #4, Address, Phone Number, Email and Date of Birth**

**4. Did any children predeceased the Decedent? If so, please list deceased child's name, date of death, and fill in the information on that person's surviving children, if any.**

**Deceased Child's Name and Date of Death**

**Name of Child surviving deceased child (grandchildren of Decedent)**

**Address, Phone number and Date of Birth of grandchild**

**5. If Decedent had no surviving spouse, children or grandchildren, please list living parents and siblings:**

**Name of individual, address, phone number, email, DOB and Relationship \***

Name of individual, address, phone number, email, DOB and Relationship \*

[Empty text box for individual information]

Name of individual, address, phone number, email, DOB and Relationship \*

[Empty text box for individual information]

Name of individual, address, phone number, email, DOB and Relationship \*

[Empty text box for individual information]

### 4. Documents Needed for Submission to Court

Please check what you already have and keep note of what you will need to get because you may need all these documents.

- Original Death Certificate for Decedent; Copies of Death Certificate for Spouse and any Children
- Original Last Will and Testament and any codicils (changes to will)
- Funeral home receipt, if paid, or else statement of unpaid funeral bill
- Information on Decedent's Real Property
- Deed for family Residence
- Deed for any property owned
- Tax Bills for any property owned
- Tenant Information if applicable
- Mortgage Information

Where will mail be directed? \*

[Empty text box for mail address]

### 5. Personal Property Items Bequeathed in Will

Name, Address, Phone Number

[Empty text box for name and address]

Items of Personal Property

[Empty text box for items of personal property]

Relationship to Decedent

[Empty text box for relationship to decedent]

### 6. Persons of entities named in the Will to receive assets, not already listed above

Name, Address, Phone number

[Empty text box for name and address]

Bequest (what this person/entity is receiving under will)

[Empty text box for bequest]

Relationship to Decedent

[Empty text box for relationship to decedent]

## 7. Additional Comments/Questions or Concerns

### Additional Information