

Probate & Estate Administration

CLIENT INTAKE & MEETING PREPARATION

01 Contact and estate information

Complete after our office requests intake and confirms the conflict-screening step. Unknown / N/A is OK.
Do not enter full SSNs, account numbers, passwords or payment-card details. Keep completed copies private.
Download and save locally before typing. No information is sent to our office by filling in this PDF.

Your name; relationship to the person who died; safe phone/email

Person who died: full legal name and other names used

Date of death; last residence, county and state; other states involved

Your requested role; anyone already acting as executor, administrator or trustee

Known court dates, notices or urgent events; identify exact dates

Current lawyer(s), if any; who they represent

Your main questions and goals

Ask our office for a verified secure return method, or bring a printed copy to your meeting.
Do not return sensitive completed forms through the website contact form or ordinary email.
Not a court/agency application or legal advice. Completing this form does not establish representation.

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02 Will, family and court status

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Will / codicils / trust: dates, original location, person holding documents; unknown is acceptable

Named executor(s), successor(s), trustee(s); appointments or letters already issued

Surviving spouse/partner, children, other relatives and named beneficiaries: names and relationships

Court/county/state, docket if known; filings, renunciations or notices already received

Any disagreement, competing document, missing original or concern needing attorney review

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03 Assets, obligations and actions taken

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Property / accounts / insurance / retirement / businesses: approximate values, title and beneficiaries

Debts / funeral expenses / taxes / benefits / Medicaid correspondence / disputed claims

Actions already taken: payments, withdrawals, sales, transfers, distributions or account changes

Out-of-state property, digital assets, litigation or unusual assets

Documents available: death certificate, will, trust, deeds, statements, notices, tax or court papers

Additional facts and questions for the attorney

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