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LAW OFFICES OF
DONALD H. WHITE, P.C.

PROBATE INTAKE FORM

Dear Client,

Thank you for considering the law offices of Donald White to help assist you in the process of probate. Let us start by saying we express our deepest condolences for you and your loved ones. Please complete the *Estate Intake Form* as thoroughly as possible. If you are unsure about what to put in some areas, please do not fill it out as one of our attorneys will assist you in going through the form at your initial consultation to make sure you understand the entire process and details.

Warm regards,

Donald White Law Firm

*This form is used to efficiently ensure your estate plan meets all your needs and goals.

** All information provided is strictly confidential.

For Office Use Only

Date:	Will
Location:	Durable POA
Total Charges:	Healthcare POA
Follow up Appt.:	Nat. Death Decl.
	Trust
	Deed

LEGAL INFORMATION: Please include full, legal names.

1. DECEDENT'S INFORMATION

Full Name of Decedent:	
Birthdate:	
Home Address:	
Date of Death:	

Was the Decedent Married at the time of their death?

At the time of death, did the Decedent have a will?

2. CLIENT'S INFORMATION (YOUR INFORMATION)

Name:	
Address:	
Primary Phone:	
Email:	
Relationship to Decedent:	
DOB:	

3. PERSONAL REPRESENTATIVE INFORMATION

Please provide the information of the intended personal representative. (If you are the client, please disregard as you already filled out your information above.)

Name:	
Address:	
Primary Phone:	
Email:	
Relationship to Decedent:	
DOB:	

4. CHILDREN INFORMATION

Child 1
Name:
Address:
Marital Status:
Number of Children:
Primary Phone:
Child 2
Name:
Address:
Marital Status:
Number of Children:
Primary Phone:

Child 3
Name:
Address:
Marital Status:
Number of Children:
Primary Phone:

Child 4
Name:

Address:
Marital Status:
Number of Children:
Primary Phone:

(If more children, then your attorney will discuss the others with you.)

Have any children passed away prior to this decedent?

5. ASSET INFORMATION

Please list any known assets

A. REAL ESTATE

Address 1:	Value:
Address 2:	Value:
Address 3:	Value:

B. BANK ACCOUNTS

BANK	TYPE OF ACCOUNT	OWNER	VALUE

C. RETIREMENT ACCOUNTS

BANK	TYPE OF ACCOUNT	OWNER	VALUE

D. LIFE INSURANCE

COMPANY	TERM	OWNER	VALUE	BENEFICIARY

E. VEHICLES

Please list any owned vehicles by Decedent

F. PERSONAL PROPERTY

Please list any personal property of great value (\$5,000 or more)

G. OTHER

Please list any other Assets or Accounts that were not mentioned above.

