

QUESTIONNAIRE INTESTATE SUCCESSION

1) Surviving Spouse Info:

Full Name _____

Social Security Number _____

Date of Birth _____

Address (mailing and physical) _____

2) Children of Decedent:

(a) Children b/w surviving spouse and decedent:

Full Name(s) _____

Social Security Number _____

Date of Birth _____

Marital Status (to whom) _____

Address (mailing) _____

(place additional names for all other children on back of this page)

(b) Children born outside of marriage with surviving spouse (i.e., different parent than surviving spouse)

Full Name _____

Social Security Number _____

Date of Birth _____

Marital Status (to whom) _____

Address (mailing) _____

(place additional names for all other children on back of this page)

(c) Adopted children

Full Name _____

Social Security Number _____

Date of Birth _____

Address (mailing) _____

(place additional names for all other children on back of this page)

3) **Date of Death:** _____

4) **Where did decedent live at the time of death?** _____

5) **Give names of two witnesses that knew decedent, knew when decedent died, knew decedent was married to surviving spouse, knew decedent's children, knew that decedent did not leave a will, and knew that decedent did not give away any property over \$500 within one year of decedent's death (make sure it is someone who can sign an affidavit before me, as notary)**

(i) Full Name: _____

Address: _____

(ii) Full Name: _____

Address: _____

- 6) **List of all property owned by decedent at the time of death: include the fair market value of property at the time of death – include**
- Land (need legal description of land) – for value, find out how much pieces of property are worth by looking at how much other pieces of property are being sold in that area. If you have an appraisal, that works as well.
 - Pension(s)
 - Rights to Copyright and Patents
 - Land Royalties (all information to land and any leases to land, etc.)
 - Any other property not described above, such as a boat or car (if a car, need the make, model, year, and vin number for vehicle; same for boat).

- Checking/Savings accounts (give account numbers and amount of money therein)
- Stocks/Bonds (all information needed for listing)

a) All Property acquired during the marriage b/w decedent and surviving spouse;

b) All Property acquired by decedent prior to marriage to surviving spouse; and any other separate property, such as property which was inherited by decedent, or was derived from a lawsuit (personal injury, etc.)

7) List of all debts of decedent at the time of death – including

- Funeral Expenses?
- Loans/Mortgages?
- Medical Expenses?
- Credit Card debt?

a) Debts incurred during marriage -

b) Debts incurred before marriage -
