

PROBATE PLANNING CHECKLIST

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INSTRUCTIONS: Please complete the following form. If you are unsure what to put or whether a question applies to your situation, you may leave it blank. Once you have completed the form, please mail, fax, e-mail, or drop the form by our office. A member of our firm will be in contact with you to discuss the form.

DECEDENT INFORMATION

Decedent's Full Legal Name: _____

Date of Birth: _____

Date of Death: _____

Your Relationship to Decedent: _____

Street Address at Death: _____

City: _____ State: _____ Zip: _____

Decedent's County of Residence: _____

Did the decedent have a will? Yes No. If yes, what date was it signed? ___/___/____. Please bring the original will with you to your appointment.

What was the marital status of the decedent? Married Single
 Divorced Widowed

Can you provide a certified copy of the death certificate? Yes No

YOUR INFORMATION

Your Full Legal Name: _____

Your Date of Birth: _____

Current Street Address: _____

City: _____ State: _____ Zip: _____

Mailing Address (if different): _____

City: _____ State: _____ Zip: _____

Telephone: Home: _____ Work: _____ Cell: _____

Facsimile: _____

E-Mail(s): _____

Relationship to Decedent: _____ If you are the decedent's spouse, on what date were you married to each other? ____ / ____ / ____

Have you or your spouse been married previously? Yes No

Have you or your spouse ever resided in Alaska, Wisconsin, Arizona, California, Idaho, Louisiana, New Mexico, Nevada, Texas or Washington? (Circle the state) If so, please provide the dates of residence in each of the above states: _____

ADMINISTRATOR INFORMATION

INSTRUCTIONS: The administrator is the person in charge of administering the decedent's estate. If the decedent had a will, this person is the Executor or Executrix named in the will. If the decedent did not have a will, you will have to ask the probate court to appoint an administrator

Who wishes to serve as Administrator? _____

Street Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Work Phone: _____

Relationship to decedent: _____

HEIRS INFORMATION

INSTRUCTIONS: Heirs are the people named in the will to receive property. If the decedent died without a will, the heirs are determined by reference to a statute known as the law of intestate succession. Please read the directions below closely to save time.

If the decedent had a will, bring the will to your appointment, and skip to the next section (entitled ESTATE PLANNING INFORMATION).

If the decedent did not have a will, please fill out the information below:

<u>Spouse</u>	<u>Date of Birth</u>	<u>Address</u>
_____	_____	_____

Children
(including adopted)

Date of Birth

Address

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

If the decedent died without a spouse or children, please bring information about the decedent's parents and siblings to your appointment.

ESTATE PLANNING INFORMATION

INSTRUCTIONS: The following information is required by the court in order to create the estate. When filling in this information, keep in mind that it is asking for property owned by the decedent. If the decedent owned it, even only as a joint owner, please include it.

Personal Property

Item	Account Number	Value
Stocks		
Bonds		
CDs		
Checking Accounts		
Savings Accounts		
Household Goods and Furniture		
Investments		
Other asset:		
Other asset:		
Other asset:		

