

PROBATE QUESTIONNAIRE

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Instructions: This questionnaire is meant to help you organize the estate and probate facts you are dealing with. Please complete this form and email or fax it to Mr. Morrise before your initial contact with him.

Your Information

Name: _____ Relationship to decedent: _____

Will you serve as initial executor*? Yes, alone Yes, with others No

*Also known as the "personal representative"

Decedent Information

Name: _____ Date of death: _____

Residence at death: _____

Decedent's survivors: spouse children other: _____
City County State

Do you have a current address for all survivors? Yes No

Decedent's property (omit jointly owned property): house other real estate bank accounts
 investment accounts other property: _____

Did the decedent own Utah real estate that needs the title cleared? Yes No

The total value of decedent's property is: not more than \$100,000 over \$100,000

Will Information (if applicable)

If the decedent had a Will, is an original of that Will available? Yes No

Does the Will name executors (personal representatives)? Yes No

Are you the highest, sole choice for executor named in the Will? Yes No

If no, who is the Will's first choice for executor? _____

Will beneficiaries: spouse children living trust other: _____

Your Basis for Becoming Executor (aka "Personal Representative") (if applicable)

Is there any dispute regarding your right to serve as executor? Yes No

On what basis do you want to be appointed as executor?

- ___ As the executor named in the decedent's Will
- ___ As a beneficiary under the decedent's Will
- ___ As a surviving spouse or a surviving child of the decedent
- ___ Other: _____

Your Concerns

Please list any specific concerns or issues that you would like to discuss: _____
