

**RAINEY & RAINEY ATTORNEYS - PROBATE**

**Today's Date** \_\_\_\_\_

|  |
|--|
| <b>Decedent's Full Name</b> _____  |
| <b>Address</b> _____ <b>City</b> _____ <b>State</b> _____ <b>Zip</b> _____   |
| <b>Date of Death and Date of Birth</b> _____   |
| <b>Decedent's age</b> _____ <b>Last 3 of SS#</b> _____ <b>Last 3 of Driver License#</b> _____  |
| <b>County Where Decedent Passed</b> _____  |
| <b>Decedent's Surviving Spouse (If Applicable)</b> _____   |
| <b>Did the Decedent Have a Will?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No  |
| <b>Did the Decedent Receive Medicaid benefits?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Do Not Know |

**YOUR INFORMATION**

**Full Name** \_\_\_\_\_

**Relationship to Decedent** \_\_\_\_\_

**Full Address** \_\_\_\_\_

**Work Phone** \_\_\_\_\_ **Home Phone** \_\_\_\_\_

**Cell Phone** \_\_\_\_\_ **E-mail** \_\_\_\_\_

**HOW DID YOU LOCATE OUR OFFICES?** (Please check each that applies and let us know who referred you to our firm. We like to thank those who recommend us.)

Previously used our services: \_\_\_\_\_

Referred by another client: \_\_\_\_\_

Referred by a professional: \_\_\_\_\_

General Reputation  Website  Internet Advertising

Yellow Pages  Waco Today  Other: \_\_\_\_\_



**ADDITIONAL INFORMATION ABOUT YOU (Required by Court for Executor)**

Date of Birth \_\_\_\_\_ Employer \_\_\_\_\_

Driver's License # \_\_\_\_\_ Social Security # (last 3 digits) \_\_\_\_\_

Have You Ever Been Convicted of or Arrested for a Crime?  Yes  No

Spouse's Name \_\_\_\_\_

Spouse's Cell Number \_\_\_\_\_ Spouse's E-Mail \_\_\_\_\_

Relative who will always know how to contact you \_\_\_\_\_

Relative's Address \_\_\_\_\_

Relative's Relationship to You \_\_\_\_\_

Relative's Cell Phone \_\_\_\_\_

**DECEDENT'S MARITAL HISTORY**

For each of Decedent's marriages, please provide the name of the spouse, the date of the marriage, the date the marriage ended, and the manner in which it ended (divorce, death or annulment):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Was the Decedent widowed at the time of death?  Yes  No

If so, did the spouse who passed away first have a will?  Yes  No

If the Decedent Was Predeceased by a Spouse, How Was the Spouse's Estate Handled?

Probate  Administration  Affidavit of Heirship  Unknown

**CHILDREN OF DECEDENT**

Full Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Complete Address \_\_\_\_\_

Phone \_\_\_\_\_

Relationship to Decedent:  Natural Child  Adopted Child  Step Child

Child's Marital Status:  Single  Married  Divorced

Full Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Complete Address \_\_\_\_\_

Phone \_\_\_\_\_

Relationship to Decedent:  Natural Child  Adopted Child  Step Child

Child's Marital Status:  Single  Married  Divorced

Full Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Complete Address \_\_\_\_\_

Phone \_\_\_\_\_

Relationship to Decedent:  Natural Child  Adopted Child  Step Child

Child's Marital Status:  Single  Married  Divorced

Full Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Complete Address \_\_\_\_\_

Phone \_\_\_\_\_

Relationship to Decedent:  Natural Child  Adopted Child  Step Child

Child's Marital Status:  Single  Married  Divorced

Full Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Complete Address \_\_\_\_\_

Phone \_\_\_\_\_

Relationship to Decedent:  Natural Child  Adopted Child  Step Child

Child's Marital Status:  Single  Married  Divorced



**DECEDENT’S ASSET AND DEBT INFORMATION**

Did Decedent own any of the following? Check all that apply.

\_\_\_\_\_ Real Property (We will need a copy of a previous deed which has a legal description)

\_\_\_\_\_ Automobiles (We will need the make, model, year and VIN for each)

\_\_\_\_\_ Accounts without beneficiary designations (We will need the name of the bank, the account number, and the value of the account at death)

Did the Decedent owe any debts at the time of passing?  Yes  No

Describe: \_\_\_\_\_

Do you expect any complications with the probate or the estate?  Yes  No

Explain: \_\_\_\_\_

Are there any family members who might want to contest the will?  Yes  No

Explain: \_\_\_\_\_

**DOCUMENTS NEEDED FOR PROBATE:**

- Original Will of Deceased Family Member
- Certified Death Certificate
- Any Estate Documents You Believe are Relevant to the Probate