

Estate Administration Questionnaire

Estate of _____

Case Number _____

Court _____

SYLVESTER LAW FIRM, PC

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General Information

Decedent's Full Legal Name

Decedent's Date of Death

Decedent's Street Address

County and State of Death

Decedent's City, State and Zip

Surviving Spouse

Decedent's Employer

Spouse's Street Address

Decedent's Work Street Address

Spouse's City, State and Zip

Decedent's Work State, City and Zip

Spouse's Phone Number

Decedent's Social Security Number

Date of Marriage

Decedent's Citizenship

Did Decedent Have Any Prior Marriages?

Executor / Trustee Information

Full Legal Name

Home Phone

Street Address

Mobile Phone

City, State and Zip Code

Work Phone

E-mail Address

Fax

Advisor Information

Financial Advisor / Trust Officer

Phone

Accountant / CPA

Phone

Other

Phone

Children / Beneficiaries

Full Legal Name	Street Address	Birthday and Year
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Social Security Number	City, State and Zip	Share of Estate
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Full legal name	Street Address	Birthday and Year
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Social Security Number	City, State and Zip	Share of Estate
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Summary of Assets

<u>Assets</u>	<u>Sole Ownership</u>	<u>Joint Tenancy</u>	<u>Total Value</u>
Checking and Savings	\$ _____	\$ _____	\$ _____
Real Estate Equity	\$ _____	\$ _____	\$ _____
Tangible Personal Property	\$ _____	\$ _____	\$ _____
Traditional IRA / 401(k)	\$ _____	\$ _____	\$ _____
Roth IRA / 401(k)	\$ _____	\$ _____	\$ _____
<u>Non-tax</u> deferred Brokerage Accts.	\$ _____	\$ _____	\$ _____
Individual Stocks and Bonds	\$ _____	\$ _____	\$ _____
Life Insurance (<i>death benefit values</i>)	\$ _____	\$ _____	\$ _____
Certificates of Deposit	\$ _____	\$ _____	\$ _____
Annuities	\$ _____	\$ _____	\$ _____
Stock Options	\$ _____	\$ _____	\$ _____
Closely Held Business Interests	\$ _____	\$ _____	\$ _____
Other _____	\$ _____	\$ _____	\$ _____
Other _____	\$ _____	\$ _____	\$ _____
<u>GROSS TOTAL OF ASSETS:</u>	\$ _____		

Value of Gross Estate for Purposes of Estate Tax Return

Liabilities

Creditor

Account Number

Amount Owed

<hr/> Creditor #1	<hr/> 	\$ <hr/>
<hr/> Creditor #2	<hr/> 	\$ <hr/>
<hr/> Creditor #3	<hr/> 	\$ <hr/>
<hr/> Creditor #4	<hr/> 	\$ <hr/>
<hr/> Creditor #5	<hr/> 	\$ <hr/>
<hr/> Creditor #6	<hr/> 	\$ <hr/>

TOTAL LIABILITIES: \$

GROSS TOTAL OF ASSETS – TOTAL LIABILITIES: \$

Net Value of Estate

Notes

Estate / Trust Tax ID Number:

File IRS Form 56 (Notice of Fiduciary Relationship):

Due Date for Federal and State Estate Tax Returns (706):

Due Date for Trust / Estate Income Tax Returns (1041):

Final Personal Income Tax Returns Filed (1040)?

Publication of Notice to Creditors?

Expiration Date for 6 Months' Notice to Creditors Period:

Memo Provided to Fiduciary?

Verified Necessary Insurance Coverage?

Other:
