BRYSON LAW FIRM, P.C.
estates | tax | asset protection | elder law

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PROBATE ADMINISTRATION FORM

Note: Complete form with all known assets and liabilities. Once Estate is established, more information will be discovered by the personal representative.

Name of deceased____

Last Address of deceased______________________________________

City ____________________State__________Zip Code__________

County____________________Date of Death____________________

Military Veteran (include branch)?______________________________

Spouse's name____________________Age or date of death____________

Executor/Administrator Name________________________________

Address____

City __________________State ____________Zip Code __________

Phone ____________________E-mail________________________

Relation to decedent____

Co-Executor/Co-Administrator Name____________________________

Address____

City __________________State ____________Zip Code __________

Phone ____________________E-mail________________________

Relation to decedent_______________________________________

FAMILY/HEIRS INFORMATION

Information about children and/or heirs (even if deceased)

Name	**Age**	***Address and Phone Number***	**Relationship**

1. Any beneficiary/child/heir that has a mental disability?

   ____

   ____

2. If any heirs listed above are cousins, grandchildren, nephews or nieces of the decedent, please indicate the deceased ancestor through whom they are related to the decedent.

ASSETS:

Cash and Notes

	Account numbers	Amount
Checking accounts		$
Savings accounts		$
Certificates of deposit		$
Credit union accounts		$
Uncashed checks		$
Notes held by decedent		$
Debts due decedent		$
Cash and valuables on decedent at death		$

Real Estate

	Account numbers	Amount
Residence		$
Other real estate		$
Cemetery lots		$
Remainderman interest in estate		$
Mortgages held by decedent		$
Contracts to buy or sell by decedent		$
Leases		$
Limited partnership interest in real estate		$

Stock and Bonds

	Account numbers	Amount
Stocks		$
Bonds		$
Mutual funds		$
Government savings bonds		$

Personal Property

	Description (Include VINs)	Current value
Cars, trucks, boats, motorcycles		$
Cars, trucks, boats, motorcycles		$
Cars, trucks, boats, motorcycles		$
Cars, trucks, boats, motorcycles		$
Cars, trucks, boats, motorcycles		$
Household furnishing and contents		$
Personal property held by others		$
Silver and gold		$
Jewelry		$
Hobby assets (coins, gems, stamps)		$
Safe deposit box		$

Other Assets

	Source	Beneficiary designated	Amount
Wages			$
Vacation pay			$
Profit sharing			$
Pension plan			$
Savings plan			$
Benefits from previous employers			$
Qualified Retirement Plans			$
IRA			$
401(k)/403(b)			$
Annuities			$
Roth			$
Life Insurance			$
Life Insurance			$
Life Insurance			$

	Description	Amount
Business assets		$
Custodial accounts		$
Frequent flyer miles (transferable to heirs, value not applicable)		$
Pets and livestock		$
Tax refunds		$
Past due alimony or child support		$
Transfers in contemplation of death		$
529 Plans		$
Education savings accounts		$
		$
		$

The probable value of decedent's estate is approximately $____________________

Did decedent or spouse receive Medicaid benefits prior to death? _________________________

Are there any other proceedings relating to this estate pending? If yes, please name the county, state, name of court, matter in which this estate relates to the proceedings, and file/case/docket number. ____

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LIABILITIES / CREDITORS:

	Name(s) and address(es)	Account number(s) (if applicable)
Charge accounts		
House mortgage		
Notes		
Other mortgages		
Utilities		
Funeral bills		
Taxes		
Past due alimony		
Child support		
Debts due as fiduciary		
Hospital		
Doctor		
Grave marker		
Pledges to charity		
Leases or rent		
Judgments Sales contracts		
Nursing Home Medicaid		
Other		

Checklist of deceased's documents needed by personal representative

1. Will (or Trust)
2. Death Certificate
3. Business records (relating to ownership and succession)
4. Divorce decrees and settlement agreements
5. Prior year income tax returns
6. Gift tax returns
7. Insurance policies
8. Financial account statements (stocks, bonds, IRA, annuities, etc.)
9. Motor vehicle titles
10. Deeds
11. Mortgage statements
12. Current bills (e.g. credit cards, auto loans, etc.)
13. Contracts & Agreements in which decedent is a party
14. List of personal property