

# PROBATE QUESTIONNAIRE

Decedent's Name: \_\_\_\_\_

Petitioner: \_\_\_\_\_

Petitioner's Address: \_\_\_\_\_

Petitioner's relationship to decedent: \_\_\_\_\_

Petitioner's Home phone # \_\_\_\_\_ Work Phone # \_\_\_\_\_

Petitioner's Social Security Number # \_\_\_\_\_

Decedent's Birthdate: \_\_\_\_\_ Age: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Date of Death: \_\_\_\_\_ Place of Death: \_\_\_\_\_

Residence at Death: \_\_\_\_\_

Occupation: \_\_\_\_\_ Social Security # \_\_\_\_\_

Marital Status: \_\_\_\_\_

Did Decedent Have a Will? \_\_\_\_\_

If no, will all heirs sign a Declination to Act indicating that they do not wish to be appointed and requesting that the Court appoint your choice of personal representative? \_\_\_\_\_

If decedent left no will, will all heirs sign a Request for Waiver of Bond? \_\_\_\_\_

Did decedent or decedent's spouse receive any Medical Assistance during their lifetime? \_\_\_\_\_. If the answer is "yes", indicate approximately how much was received by decedent \_\_\_\_\_; decedent's spouse \_\_\_\_\_.

## PROBATE ASSETS

### Personal Property:

### VALUE

Household Goods & Furnishings \_\_\_\_\_

Stocks \_\_\_\_\_

Notes, Bonds, CD's \_\_\_\_\_

Checking, Savings & Cash  
List account number(s) if known \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Automobile(s) \_\_\_\_\_

Other: Farm equipment, livestock, etc. \_\_\_\_\_

TOTAL \$ \_\_\_\_\_

REAL ESTATE:

HOMESTEAD

County of \_\_\_\_\_

State of \_\_\_\_\_

City Property: \_\_\_\_\_

Rural Property: \_\_\_\_\_

Estimated Value: \$ \_\_\_\_\_

Assessed Valued from Tax Statement: \$ \_\_\_\_\_

Is there a Mortgage, lien or other encumbrance against this property? \_\_\_\_\_

Approximate Amount: \$ \_\_\_\_\_

LEGAL DESCRIPTION:

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

Do you intend to sell the real estate or have it distributed out to one or more of the heirs?

\_\_\_\_\_

Has a purchaser been found for this real estate: \_\_\_\_\_

If so, Purchasers' names & address: \_\_\_\_\_

\_\_\_\_\_

Sale Price: \$ \_\_\_\_\_

NON-HOMESTEAD:

County of \_\_\_\_\_

State of \_\_\_\_\_

City Property: \_\_\_\_\_

Rural Property: \_\_\_\_\_

Estimated Value: \$ \_\_\_\_\_

Assessed Valued from Tax Statement: \$ \_\_\_\_\_

Is there a Mortgage, lien or other encumbrance against this property? \_\_\_\_\_

Approximate Amount: \$ \_\_\_\_\_

LEGAL DESCRIPTION:

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

Do you intend to sell the real estate or have it distributed out to one or more of the heirs?

\_\_\_\_\_

Has a purchaser been found for this real estate: \_\_\_\_\_

If so, Purchasers' names & address: \_\_\_\_\_

Sale price: \$ \_\_\_\_\_

Has a purchase agreement been signed? \_\_\_\_\_

# HEIRS-AT-LAW

(Heirs-at-law are first the Spouse and children & issue of any deceased children. If the decedent was not married or never had any children, then the heirs-at-law would be his parents, if they are still living. If they are not living, the heirs-at-law would be the decedent's brothers and sisters and if any of the decedent's brothers and sisters predeceased decedent, you must also list the issue of any deceased brothers and sisters, i.e. the nieces and nephews from that deceased brother or sister.)

NAME	BIRTHDAY (If under age 18)	RELATION- SHIP	ADDRESS
_____	_____	_____	_____ _____
_____	_____	_____	_____ _____
_____	_____	_____	_____ _____
_____	_____	_____	_____ _____
_____	_____	_____	_____ _____
_____	_____	_____	_____ _____

PROBABLE AMOUNT OF DECEDENT'S DEBTS \$ \_\_\_\_\_

Who do you wish to be appointed administrator? \_\_\_\_\_

Whose address is: \_\_\_\_\_

What newspaper do you want the notice published in? Long Prairie Leader \_\_\_\_\_  
Browerville Blade \_\_\_\_\_  
Eagle Bend/Clarissa \_\_\_\_\_  
Staples World \_\_\_\_\_

If probate will be filed outside of Todd County, notice must be published in the appropriate county.

Before the estate can be closed it will be necessary to file with the Court a Final Account which must balance to the penny. Although all checks will have to be signed by the personal representative, in some instances, the personal representatives prefer to have the attorney's office handle the bookkeeping and actually prepare all checks, balance the checkbook monthly, etc. (See letter to prospective personal representative.)

Estate checks & ledger will be kept by: Representative \_\_\_\_\_ Atty \_\_\_\_\_