INTAKE SHEET FOR PROBATE MATTERS

1. Name & Address of Decedent: _____

_____

2. County: _____

3. Date of death: _____ Age at time of death: _____

4. Date of Last Will: _____ Date of Codicil(s): _____

5. Social Security No. of Decedent: _____

6. Social Security No. of (nominate) Personal Representative: _____

7. Marital Status: (circle one) Married Divorced Widow Separated
   Spouse: Name: _____

   Address: _____

   If spouse pre-deceased, must have date of death: _____

8. Are there any pre- or post-nuptial agreements? _____

9. Are there any divorce decrees or other court orders involving the deceased which may be relevant to the probate proceeding? If so, give details. _____

_____

10. Name, address and telephone number of nominate Personal Representative: _____

_____

11. Names and address of all immediate family members: _____

_____

_____

_____

_____

_____

_____

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12. If anyone is listed in the decedent's will or codicil(s) other than those persons named above, please give the names and addresses: _____

_____

_____

13. Please list the assets of the decedent: **Important:** List the **exact** name in which the title is held & provide **documentation** of ownership.

a. Real property (please specify if any property is jointly owned): _____

_____

_____

_____

b. Automobiles (please specify if jointly owned): _____

_____

_____

c. Cash Assets (please specify if any accounts are jointly owed): _____

_____

_____

_____

_____

d. Stocks/Bonds: _____

_____

e. Life Insurance Policies: _____

_____

f. Beneficiaries: _____

_____

g. Jewelry: _____

_____

h. Coin/stamp collections or any other extraordinary personal property: _____

_____

_____

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i. Other: _____

_____

_____

14. Was the decedent a beneficiary of a trust? If so, give details. _____

_____

_____

_____

15. Did the decedent own any interest in a partnership or business? If so, give details. _____

_____

_____

Please provide our office with the following:

* original will and any codicils
* death certificate
* deeds / title to any property owned by the deceased
* statements to bank accounts, stocks, bonds, etc
* any known bills or creditors of the decedent

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ITEMS TO COVER WITH CLIENT

Duties of Personal Representative—overview

*Inventory assets, creditor's window, pay debts and taxes, order of payment, distributions
*How much client wishes to do
*Difference between formal and informal probate
*Accounting necessary to close estate (unless PR is sole heir)

SS-4 for Estate - change tax id number with banks, brokers, any income-producing asset
PR fee or waive

What should be done immediately:

*Cancel credit cards (write letter to waive interest)
*Change of address for mail
*Mortgage
*Newspaper, cable & other non-essential items re: house

Review insurance: what to cancel and what to keep for now. If keeping (house, car, etc.), advise carrier of death and insurance is billed to estate, care of PR.
Verify real property and income taxes are current

Exempt Family Allowance no more than $12,000 at $1,000/month (C.R.S. 15-11-404) Spouse and dependent children under 21 eligible.

Social Security check and $225 burial benefit. Payable only to spouse if living with decedent at time of death, or, if no spouse but minor children under age 19, payable proportionately to minor children. Must call Social Security within 2 years.

Sale of residence

Consider written notices to 3rd parties such as insurance companies, bank, broker, employer if required for purposes of augmented estate (C.R.S. 15-11-208).
Ancillary administration - property in other states