

ELDER LAW FIRM OF ANDREW OLSEN

www.olsenelderlaw.com



Andrew W. Olsen, J.D.
Email: Andy@olsenelderlaw.com
Lisa Salines-Mondello, J.D., LL.M*
Email: Lisa@olsenelderlaw.com
Of Counsel
Tasha M. McKinney, Paralegal
Email: Tasha@olsenelderlaw.com
*Also licensed in Massachusetts

Main Office:
213 North Second Street
Wilmington, North Carolina 28401
Telephone: (910) 254-0599
Facsimile: (910) 254-1481

ESTATE ADMINISTRATION CLIENT INFORMATION FORM

PERSONAL DATA

Today's Date: _____ Prepared by: _____

Name of Deceased: _____

Date of death: ____/____/____

Date of birth: ____/____/____ SSN ____-____-____

Residence of deceased: _____

Veteran: yes____ no____

Did the deceased have a will? yes ____ no ____

If yes, where is it located? _____

If yes, who is the main executor? _____

Address of executor _____

Telephone Number of executor Home: _____ Cell: _____

Email Address of executor _____

FAMILY

Did the deceased leave a surviving spouse? yes____ no____

Is yes, what is the surviving spouse's name: _____

Is yes, what was the date of marriage: _____

Children of Deceased:

Name	Address	Age
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

If the deceased had no surviving spouse or children, who is the next of kin?

Parents: _____
Name *Address*

Siblings: _____
Name *Address*

Grandchildren: _____
Name *Address*

Nieces and Nephews: _____
Name *Address*

FINANCIAL

Income Producing Assets:

Bank accounts, CDs, Brokerage Accounts, Stocks, Corporate or U.S. Bonds, other

<i>Description & Location of Property:</i>	<i>Value</i>	<i>Account No.</i>	<i>Owner</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Total: _____

Had the deceased ever made any transfers or gifts of more than \$10,000 to an individual in a single calendar year?

yes____ no ____

If yes, was a gift tax return filed?

yes____ no____

Real Estate:

<i>Description of Property Address of Owner</i>	<i>Purchase Date</i>	<i>Purchase Price</i>	<i>Value</i>
_____	_____	_____	_____
_____	_____	_____	_____

Did the deceased have an interest in any business? yes____ no____

Life Insurance

<i>Company</i>	<i>Face Value</i>	<i>Cash Value</i>	<i>Policy No.</i>	<i>Beneficiary</i>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Other Property with Designated Beneficiaries

Did the deceased have IRAs, Vested Pension Plans, Annuities, or other assets that passed upon death to a particular beneficiary whom the deceased had designated?

<i>Description</i>	<i>Value</i>	<i>Designated Beneficiary</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Was the deceased entitled to an inheritance? yes____ no ____

Was the deceased the beneficiary of any trust? yes____ no ____

Liabilities:

Mortgages, Notes to banks, notes to others, Loans on insurance, other

<i>Description</i>	<i>Balance Due</i>	<i>Monthly Payment</i>	<i>Maturity Date</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Location of important papers: _____

PERSONAL PROPERTY (Autos, R.V.s, Boats, Antiques, Heirlooms, Jewelry, Collections, etc.)

<i>Description of Property</i>	<i>Location</i>	<i>Value</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Please bring copies of the following documents with you to your meeting with the attorney

- 1. Original Will, Codicil, Trust Agreements, Memorandum regarding distribution of personal property.*
- 2. Real Estate Deeds, appraisals or real estate tax bills*
- 3. Divorce Decrees, Prenuptial Agreements, Adoption Papers*
- 4. Two original death certificates*
- 5. Life insurance policies*
- 6. Income tax return*
- 7. Statements for bank accounts owned solely or jointly by the decedent showing their value as of the date of death*