

Estate Administration Questionnaire

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* Required

1. Email address *

2. Deceased Person *

Enter the full legal name of the deceased person, along with informal nickname if applicable. Also state the deceased person's final mailing address and dates of birth and death.

3. Administrator *

Print your name as you would expect it to appear on legal documents, along with informal nickname if applicable. Also include your mailing address, phone number, and relationship to the deceased person.

4. Did the deceased person leave a will?

Note: a copy of a will is not a valid will.

Mark only one oval.

Yes

No

Not sure

5. Did the deceased person establish a revocable living trust?

Mark only one oval.

Yes

No

Not sure

6. Did the deceased person own any real estate located outside the state of Arizona?

Mark only one oval.

Yes

No

Not sure

7. Is the total value of the deceased person's estate less than \$75,000?

Mark only one oval.

Yes

No

Not sure

8. Is the total value of the deceased person's estate more than \$11,580,000?

Mark only one oval.

Yes

No

Not sure

9. Are the deceased person's total assets worth more than the combined debts?

Mark only one oval.

Yes

No

Not sure

10. Is there anyone else with higher or equal priority to serve as administrator of the estate?

Mark only one oval.

Yes

No

Not sure

11. Is the deceased person survived by any minor or dependent children?

Mark only one oval.

Yes

No

Not sure

12. Was the deceased person preceded in death by a child or grandchild?

Mark only one oval.

Yes

No

Not sure

13. If you are the surviving spouse, is the deceased person survived by any children from a prior relationship?

Mark only one oval.

- Yes
- No
- Not applicable

14. Did the deceased person have a safe deposit box?

Mark only one oval.

- Yes
- No
- Not sure

15. Did the deceased person meet regularly with a financial advisor?

Mark only one oval.

- Yes
- No
- Not sure

16. Life Insurance

Provide a list summarizing any life insurance policies owned by the deceased person.

17. Retirement Accounts

Provide a list summarizing any retirement accounts owned by the deceased person.

18. Small Business Interests

Provide a list summarizing any small business ownership interests owned by the deceased person.

19. Other Assets

To the extent possible, provide a brief summary of other assets owned by the deceased person including real estate, bank accounts, brokerage accounts, and their approximate values if known.

20. Beneficiary Information

Provide a list of the deceased person's children including their ages and mailing addresses.

21. Signature *

Please enter your name here to sign the questionnaire:

22. Date *

Please enter today's date.

Example: January 7, 2019

Google Forms