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in the District of Columbia*

**CONFIDENTIAL PROBATE QUESTIONNAIRE  
FOR PERSONAL REPRESENTATIVE**

Date: \_\_\_\_\_

***Please print or type the information requested.***

***There may be some areas which may not be applicable to your situation, if so,  
please mark n/a as appropriate.***

**PART A. PERSONAL REPRESENTATIVE (aka EXECUTOR) INFORMATION**

**1. Personal Representative(s):**

<b>Full Name:</b>	
<b>Residence Address:</b>	
<b>Best Telephone number to reach you:</b>	
<b>Best e-mail to reach you:</b>	
<b>Profession/Your title</b>	
<b><i>Your social security number (necessary to obtain an EIN to open an estate checking account)</i></b>	

**PART B. Your Loved One's INFORMATION**  
**(Please note that the legal term for your loved one who has passed is Decedent)**

1. Full Name of decedent:
2. Date of Death:
3. Place of Death:
4. Date of Birth:
5. Was he/she ever married? Yes [ ] No [ ]

Name of former spouse:

Date of former spouse's divorce or death:

6. What was her/his home address:
7. Year Maryland or D.C. Residence Established:
8. Citizenship: U.S. Yes [ ] No [ ] Other:

Citizenship of spouse:

9. Decedent's Social Security No.:
10. Was he/she a veteran?

Service Number:

VA Number:

12. Did she/he have a Safe Deposit Box: If so, where?
13. Who has access to the Safe Deposit Box?
14. Did he/she have a will? Yes [ ] No [ ]
15. Who has custody of the ORIGINAL Will?

Please describe how the ORIGINAL will was located. (This information will be needed on the Petition for Probate)

**PART C. FAMILY INFORMATION** (use additional sheets if necessary)

**1. Decedent's children (Including those legally adopted):**

<b>Name</b>	<b>Age</b>	<b>Address</b>	<b>Marital Status</b>

**2. Are any children deceased? Yes [ ] No [ ] If so, what is the approximate date of death?**

**Name(s):** \_\_\_\_\_

**3. Grandchildren:**

<b>Name of Grandchild</b>	<b>Name of Parent</b>	<b>Date of Birth</b>

**4. Living Parents of Decedent:**

<b>Name</b>	<b>Age</b>	<b>Address</b>	<b>Marital Status</b>

**5. Brothers and Sisters of Decedent:**

<b>Name</b>	<b>Age</b>	<b>Address</b>	<b>Marital Status</b>

**6. Prior Marriages (If Applicable)**

<b>Prior Spouse</b>	
<b>Children of Prior Marriage</b>	
<b>Name</b>	
<b>Address</b>	
<b>Date of Marriage</b>	
<b>Place</b>	
<b>Date of Dissolution</b>	

**PART D. ASSET INFORMATION (Add additional sheets if necessary)**

**1. Did the decedent:**

- (a) **Expect to receive benefits from a retirement plan?** Yes [ ] No [ ]  
*(specify at no. 8 below)*
- (b) **Have powers of appointment?** Yes [ ] No [ ]
- (c) **Have beneficial interests in trusts?** Yes [ ] No [ ]
- (d) **Have an interest in a Buy-Sell Agreement?** Yes [ ] No [ ]

**2. Did the decedent have any pre or post marriage agreements?**

**Prior to marriage?** Yes [ ] No [ ]  
**After marriage?** Yes [ ] No [ ]

**3. Real Estate:**

<b>Address</b>	<b>Current Market Value</b>	<b>Tax Appraised Value</b>	<b>Cost Basis (Purchase Price)</b>	<b>How Was Title Held? (Sole/Joint; indicate co-owner(s))</b>

**4. Life Insurance:**

<b>Company and Policy Number</b>	<b>Death Benefit</b>	<b>Approx. Cash Value</b>	<b>Person Insured</b>	<b>Policy Owner</b>	<b>Beneficiary</b>

**5. Checking/Money Market/ Savings Accounts:**

<b>Institution</b>	<b>Approximate Balance</b>	<b>How Was Title Held? (Sole/Joint; indicate co-owner(s))</b>

**6. Securities/Mutual Funds:**

<b>Company</b>	<b>No. of Shares</b>	<b>Original Cost</b>	<b>Approximate Market Value</b>	<b>Date of Purchase</b>	<b>How Was Title Held? (Sole/Joint; indicate co-owner(s))</b>

**7. Approximate Values of Personal Property (vehicles, jewelry, art, collections, other household goods):**

<b>Description</b>	<b>Original Cost</b>	<b>Appx. Fair Market Value</b>


**8. Notes, Retirement Plans, and Other Assets:**

Description	Value

**9. Mortgages and Debts:**

Type and to Whom Owed	Approximate Amount

**PART E. LEGATEES**

**If the decedent died with a will, please list the named legatees:**

Name	Age	Address	Marital Status

Name	Age	Address	Address	Marital Status	Marital Status

The following is a **partial** list of items you will be required to furnish to open an estate in Maryland or in the District of Columbia:

- Decedent's Last Will and Testament, if any existed
- Death Certificate
- Funeral Contract/Bill
- Approximate value of assets in the decedent's name alone
- Title to decedent's automobiles and/or other motor vehicles
- Names and addresses of "interested persons" (i.e. legatees and/or family members/heirs) in the estate
- Any applicable filing fee