

**CONFIDENTIAL PROBATE QUESTIONNAIRE  
FOR PERSONAL REPRESENTATIVE**

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

***Please print or type the information requested. To complete within the document, just type inside the tables or inside the gray boxes (they will expand as necessary), then print the form, or save the file and e-mail it. Alternatively, you may print the form and complete by hand. 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:**

<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>Your social security number (necessary to obtain an EIN to open an estate checking account)</b>	

**PART B. DECEDENT INFORMATION**

- 1. Full Name of decedent:**
- 2. Date of Death:**
- 3. Place of Death:**
- 4. Date of Birth:**
- 5. Was decedent ever married? Yes [ ] No [ ]**  
**Name of spouse:**  
**Date of former spouse's divorce or death:**
- 6. Decedent's home address:**
- 7. Year Maryland Residence Established:**
- 8. Citizenship: U.S. Yes [ ] No [ ] Other:**  
**Citizenship of spouse:**
- 9. Decedent's Social Security No.:**
- 10. Was decedent a veteran?**  
**Service Number:**  
**VA Number:**
- 12. Did the Decedent have a Safe Deposit Box: If so, where?**
- 13. Who has access to the Safe Deposit Box?**
- 14. Did decedent have a will? Yes [ ] No [ ]**
- 15. Who has custody of the ORIGINAL Will?**

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

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

Name	Age	Address	Marital Status

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

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

**3. Grandchildren:**

Name of Grandchild	Name of Parent	Date of Birth

**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 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):**

Description	Original Cost	Appx. Fair Market Value

**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:**

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

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

- 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 persons interested in the estate
- Any applicable filing fee