Probate & Trust Administration Intake Form

Decedent Information

Decedent's Name: ____

Last Address: ____

County of Residence: ______________________ Date of Birth: ______________________

Date of Death: ______________________ Marital Status: ______________________

Spouse's Name (if applicable): ____

Did the decedent have a Will? ☐ Did the decedent have a Living Trust? ☐

Did the decedent have a financial advisor? ______________ CPA? ______________

Advisor(s) Name, Phone & Email: ____

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DECEDENT'S CHILDREN AND/OR BENEFICIARIES NAMES	SEX M/F	BIRTH DATE	SPECIAL NEEDS?

Executor Information

Name(s): ____

Address(es): ____

____

Phone Number: ______________ Email: ______________________________

Was the decedent a client of Wakefield Law, PC? __________ If not, referred by: ______________

Wakefield Law, PC
(248) 457-9860
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Financial Information

DESCRIPTION OF ASSET	**OWNERSHIP TITLING OF ASSET AT DEATH** **(i.e. trust, joint with rights of survivorship, in deceased individuals name, etc.)**	**ESTIMATED VALUE**
REAL ESTATE		
Residence		
Rental Property		
Other Vacation/trailer/timeshare)		
PERSONAL PROPERTY		
Vehicle/motorcycle/boat		
Jewelry		
Other (collectibles)		
CASH ACCOUNTS		
Checking/Savings		
CDs		
Other		
INVESTMENTS		
Business Interests		
Stock/Bonds/Mutual Funds		
Life Insurance		
RETIREMENT ACCOUNTS		
Individual Retirement Accounts (IRAs)		
401(k)s		
Annuities		
OTHER ASSETS		
TOTAL ASSETS		

**Please fill out as much of the listed information above as you have available to ensure you get the most out of this time with the attorney. However, we understand that not all of it may be available to you, so you may estimate values or leave items blank.

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