



THE BLACKBURN LAW FIRM, PLLC

P. O. Box 70, Olive Branch, MS 38654
Phone: 662-895-6116 / Fax: 662-895-6121

Administration Questionnaire - Alabama (Decedent died with Will)

Client Information:

Name: _____ Relationship to deceased: _____

Social Security No: _____ date of birth _____

Address: _____

City _____ County _____ State _____ Zip _____

Home phone: _____ Work phone: _____ Cell phone: _____

Email Address: _____

What is the best way to contact you? _____ Email _____ US Mail _____ Phone no: _____

Information on deceased individual:

Name: _____ Date of birth: _____

SS#: _____ Date of death: _____ Age at death: _____

Address at death: _____

City _____ County _____ State _____ Zip _____

Will Information:

Does client have the decedent's Last Will and Testament in your possession? yes _____ no _____

If no, who has possession of said Will _____

Are you aware of any Codicils to the Last Will and Testament of Decedent? yes _____ no _____

Did the Will waive Bond? yes _____ no _____ Was Accounting waived? yes _____ no _____

Did the Will waive Inventory? yes _____ no _____ Was Appraisal waived? yes _____ no _____

Is any beneficiary named in the Will a minor? yes _____ no _____

If yes, state name and date of birth: _____

Is any beneficiary named in the Will disabled? yes _____ no _____

If yes, state name and disability: _____

Beneficiary/Executor information:

List the name, address, Social Security number, date of birth and relationship of each beneficiary named in the Last Will and Testament:

| <u>Full name</u> | <u>Address</u> | <u>Social Security #</u> | <u>DOB</u> | <u>Relationship</u> |
|------------------|----------------|--------------------------|------------|---------------------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

List the name, address, Social Security number, date of birth and relationship of each Executor / Executrix named in the Last Will and Testament:

| <u>Full name</u> | <u>Address</u> | <u>Social Security #</u> | <u>DOB</u> | <u>Relationship</u> |
|------------------|----------------|--------------------------|------------|---------------------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

Does the Executor / Executrix intend to charge a fee for his / her services? yes _____ no _____

If so, please state amount: _____

Decedent Information

How long did decedent live in Alabama? _____

Did deceased leave a surviving spouse? yes _____ no _____

If yes, state name of spouse: _____ spouse's SS#: _____

Was decedent predeceased by a spouse? yes _____ no _____

If yes, provide name of deceased spouse: _____

Spouse's date of death: _____ Spouse's SS#: _____

Does decedent have any surviving children? yes _____ no _____

If yes, state name of each child, social security number, city and state of residence:

| <u>Name</u> | <u>City</u> | <u>State</u> | <u>Social Security No.</u> |
|-------------|-------------|--------------|----------------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Does decedent have any surviving siblings? yes _____ no _____

If yes, state name of each sibling, city and state of residence:

| <u>Name</u> | <u>City</u> | <u>State</u> |
|-------------|-------------|--------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Estate Information

Did the decedent have a safe deposit box? yes _____ no _____

If so, where was it located? Bank name _____ bank address _____

Total cost of funeral expenses, even if prepaid by decedent: _____

List address and approximate value of all real property owned by the decedent:

| <u>Address</u> | <u>County</u> | <u>State</u> | <u>Approx. Value</u> | <u>any mortgage?</u> | |
|----------------|---------------|--------------|----------------------|----------------------|-----------|
| | | | | <u>yes</u> | <u>no</u> |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |

For any mortgage checked above, list the name and address of the mortgage company, the account number and the approximate balance owed at the time of death:

| <u>Name & Address of mortgage company</u> | <u>Account Number</u> | <u>Approx. Balance</u> |
|---|-----------------------|------------------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

List name of all accounts (bank accounts, CDs, IRAs, Money Market Accounts, Retirement Accounts, Stocks, Bonds, etc.) owned by decedent, account number, name and address where located, phone number and approximate value at the time of death:

1.

| | | |
|---------------------------------|----------------|----------------|
| Name of Account/Type of Account | Account number | Value at death |
| Address/location of Account | | Phone number |

2.

| | | |
|---------------------------------|----------------|----------------|
| Name of Account/Type of Account | Account number | Value at death |
| Address/location of Account | | Phone number |

3.

| | | |
|---------------------------------|----------------|----------------|
| Name of Account/Type of Account | Account number | Value at death |
| Address/location of Account | | Phone number |

4.

| | | |
|---------------------------------|----------------|----------------|
| Name of Account/Type of Account | Account number | Value at death |
| Address/location of Account | | Phone number |

5.

| | | |
|---------------------------------|----------------|----------------|
| Name of Account/Type of Account | Account number | Value at death |
| Address/location of Account | | Phone number |

6.

| | | |
|---------------------------------|----------------|----------------|
| Name of Account/Type of Account | Account number | Value at death |
| Address/location of Account | | Phone number |

List all life insurance policies owned by or on the life of the decedent, name and address of insurance company, the beneficiary, the policy number and its value:

1.

Insurance Company name and address

| Policy number | Beneficiary name | value |
|---------------|------------------|-------|
|---------------|------------------|-------|

2.

Insurance Company name and address

| Policy number | Beneficiary name | value |
|---------------|------------------|-------|
|---------------|------------------|-------|

3.

Insurance Company name and address

| Policy number | Beneficiary name | value |
|---------------|------------------|-------|
|---------------|------------------|-------|

Please provide this office with copies of the following documents:

1. **Last Will and Testament**
2. **Any Codicils to Last Will and Testament**
3. **Death Certificate**
4. **Provide copies of last statement after death of all bank accounts, CDs, IRAs, Money Market Accounts, Retirement Accounts, Stocks, Bonds, etc.**
5. **Provide copy of all Certificate of Deposits**
6. **Inventory of Safe Deposit Box**
7. **Copy of all insurance policies**