



Seek Counsel from Meyer Capel
Our History Speaks Volumes

Confidential Questionnaire
Estate & Trust Administration

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Estate and Trust Administration Questionnaire

Regardless of whether a person has a Will, the form of ownership of each asset dictates who controls that particular asset after death and how each asset will pass at death. There are several forms of property ownership and each form of ownership dictates a different disposition of that property at death. The attached questionnaire is designed to help me evaluate how each asset will pass and whether a probate of the estate is required. In order for me to properly advise you in this regard, I require detailed knowledge of the ownership and value of the assets of the decedent. To complete the asset portion of this questionnaire, describe the asset in the first column; then below the type of ownership columns please note the approximate value of the asset.

Your Name	
Address	
Email Address	
Telephone	

Name of Decedent	
Address	
Date of Death	
Place of Death	

Did the decedent have a Will? ☐ Yes ☐ No If yes, provide copy.

Did the decedent have a Trust? ☐ Yes ☐ No If yes, provide copy

DESCRIPTION OF ASSET	OWNERSHIP, REGISTRATION, TITLE OF ASSET				
	SOLE WITHOUT BENEFICIARY DESIGNATION	JOINT WITHOUT SURVIVORSHIP	JOINT WITH SURVIVORSHIP	BENEFICIARY DESIGNATION	TRUST
CHECKING ACCOUNTS					
EXAMPLE: ABC Bank Checking Account	\$3,000				
SAVINGS ACCOUNTS					

DESCRIPTION OF ASSET	OWNERSHIP, REGISTRATION, TITLE OF ASSET				
	SOLE WITHOUT BENEFICIARY DESIGNATION	JOINT WITHOUT SURVIVORSHIP	JOINT WITH SURVIVORSHIP	BENEFICIARY DESIGNATION	TRUST
CERTIFICATES OF DEPOSIT					
BROKERAGE ACCOUNTS AND MUTUAL FUNDS					
STOCKS AND BONDS					

DESCRIPTION OF ASSET	OWNERSHIP, REGISTRATION, TITLE OF ASSET				
	SOLE WITHOUT BENEFICIARY DESIGNATION	JOINT WITHOUT SURVIVORSHIP	JOINT WITH SURVIVORSHIP	BENEFICIARY DESIGNATION	TRUST
REAL ESTATE					
IRAS, 401(k)s, KEOGH, PROFIT SHARING					
LIFE INSURANCE					

DESCRIPTION OF ASSET	OWNERSHIP, REGISTRATION, TITLE OF ASSET				
	SOLE WITHOUT BENEFICIARY DESIGNATION	JOINT WITHOUT SURVIVORSHIP	JOINT WITH SURVIVORSHIP	BENEFICIARY DESIGNATION	TRUST
ANNUITIES					
CLOSELY HELD CORPORATIONS, LLCs					
INDIVIDUALLY HELD STOCKS AND BONDS					

DESCRIPTION OF ASSET	OWNERSHIP, REGISTRATION, TITLE OF ASSET				
	SOLE WITHOUT BENEFICIARY DESIGNATION	JOINT WITHOUT SURVIVORSHIP	JOINT WITH SURVIVORSHIP	BENEFICIARY DESIGNATION	TRUST
NOTES RECEIVABLE					
OTHER (PERSONAL PROPERTY, VEHICLES, ETC)					

NAME OF CREDITOR	DESCRIPTION OF DEBT	AMOUNT OF DEBT
MORTGAGES/LOANS: HOME, CARS, ETC.		
UTILITIES		
CREDIT CARDS		

NAME OF CREDITOR	DESCRIPTION OF DEBT	AMOUNT OF DEBT
MEDICAL		
MISCELLANEOUS		
FUNERAL		

