

PROBATE INFORMATION SHEET

Estate of \_\_\_\_\_

Personal Representative \_\_\_\_\_

Date of Death \_\_\_\_\_ Date of Birth \_\_\_\_\_

Marital Status \_\_\_\_\_ Social Security Number \_\_\_\_\_

Spouse's Name \_\_\_\_\_ Deceased: Yes No If YES, Date: \_\_\_\_\_

Spouse's Social Security Number \_\_\_\_\_

Spouse's Date of Birth \_\_\_\_\_

Occupation \_\_\_\_\_ Retired: Yes No

Year domicile was established in Alabama \_\_\_\_\_

Have any gift taxes been filed for decedent? Yes No If yes, attach copy of each return.

List of Savings Bonds with year purchased, serial number, face amount, and form of ownership:

Year Purchased	Serial Number	Face Amount	Form of Ownership
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Are there any assets located in another state? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Bank Accounts to include name, account number, and address:

Name of Bank	Account #	Address
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Solely owned real property:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Jointly owned real property: (specify co-owner)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_







Were there income tax liabilities/refunds for the year of death?

Attach copies of the following documents:

Deeds

Last filed tax return

Death Certificate (Certified)

Any recent appraisals of property

Car titles in decedent's name

\*\*\*If you are unable to locate all the information, please do not worry. Simply provide us with as much as you can and we will contact the necessary companies to obtain anything further.