



Syndicate Subscription Legal Plans

PROBATE & ESTATE ADMINISTRATION **CLIENT INTAKE QUESTIONNAIRE:**

IF YOU HAVE THE ORIGINAL WILL, it generally must be delivered (lodged) with the court in the county where the person lived within 30 days of death. Do not distribute assets, sell property, or pay non-urgent bills until you have court authority, and keep estate money separate from your own.

CONFIDENTIAL. Probate is the court-supervised process of collecting a person's assets, paying debts and taxes, and distributing what is left to the people entitled to it — whether or not there was a will. Not every estate requires full probate; smaller estates, jointly held property, trusts, and accounts with named beneficiaries often pass outside probate. If a question does not apply, write "N/A." If unknown, write "Unknown."

NAME OF THE CLIENT:

Your role:

- | | |
|---|--|
| ☐ Executor named in the will | ☐ Family member seeking appointment |
| ☐ Heir / beneficiary | ☐ Successor trustee |
| ☐ Creditor of the estate | ☐ Other |

☐ Full Legal Name: _____ Relationship to the deceased: _____

Address: _____

City: _____ County: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Syndicate Plan Member ID: _____ Plan Start Date: _____

Preferred method of contact:

- | | | |
|--------------------------------|-------------------------------|--------------------------------|
| ☐ Phone | ☐ Text | ☐ Email |
|--------------------------------|-------------------------------|--------------------------------|

PART 1 — THE PERSON WHO DIED

1.1 Full legal name (and any other names used): _____

1.2 Date of birth: _____ Date of death: _____ Place of death: _____

1.3 County and state of residence at death: _____

1.4 Marital status at death:

- | | | |
|-----------------------------------|--|----------------------------------|
| ☐ Married | ☐ Registered domestic partner | ☐ Widowed |
| ☐ Divorced | ☐ Single | |

Surviving spouse / partner name: _____

1.5 Did the person own property in another state or country? ☐ Yes ☐ No

Property in another state may require a separate (ancillary) probate there.

1.6 Was the person receiving Medi-Cal / Medicaid or other public benefits? ☐ Yes ☐ No

The state may file a claim against the estate for benefits paid. Notice to the agency is usually required.

PART 2 — WILL & ESTATE DOCUMENTS

2.1 What exists?

- | | |
|-------------------------------|--|
| ☐ Will | ☐ Multiple wills / codicils |
|-------------------------------|--|



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☐ Living trust

☐ No will (intestate)

☐ Not sure

Date of will: _____ Executor named: _____

2.2 Do you have the ORIGINAL will? ☐ Yes ☐ No

Where is it located? _____

2.3 Has the will been lodged (filed) with the court? ☐ Yes ☐ No

2.4 Does the will leave out any assets, or is it unclear? ☐ Yes ☐ No

If yes, explain: _____

2.5 Is there a trust that holds some assets? ☐ Yes ☐ No

Assets titled in a trust are usually handled by the successor trustee outside of probate.

PART 3 — FAMILY & HEIRS

Name	Relationship to Deceased	Age (if minor)	Address / City & State	Named in Will?

3.1 Did a child or sibling die before the deceased, leaving children? ☐ Yes ☐ No

If yes, explain: _____

3.2 Are any heirs missing, estranged, or hard to locate? ☐ Yes ☐ No

If yes, explain: _____

3.3 Are any heirs minors or unable to manage money? ☐ Yes ☐ No

If yes, explain: _____



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PART 4 — ASSETS

List everything the person owned. Note how each asset is titled — joint tenancy, trust, or accounts with named beneficiaries usually pass outside probate.

Asset (property address, account, vehicle, business)	How Titled / Beneficiary Named	Est. Value \$	Loans / Liens \$

4.1 Estimated gross value of everything: \$ _____ Value subject to probate: \$ _____

4.2 Is there a safe deposit box, storage unit, or hidden cash? ☐ Yes ☐ No

4.3 Is anyone living in, or using, estate property? ☐ Yes ☐ No

If yes, explain: _____

4.4 Did the person own a business that is still operating? ☐ Yes ☐ No

PART 5 — DEBTS, TAXES & EXPENSES

Obligation	Amount \$	Paid By
Mortgage(s)		
Credit cards / personal loans		
Medical bills		
Funeral & burial costs		
Income taxes owed		
Property taxes		
Other claims		

5.1 Do the assets appear to be enough to pay all debts? ☐ Yes ☐ No

5.2 Have any creditors made claims or demands? ☐ Yes ☐ No

If yes, explain: _____

5.3 Were the last few years' income tax returns filed? ☐ Yes ☐ No



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PART 6 — WHAT DO YOU NEED?

6.1 Check all that apply:

- | | |
|---|---|
| ☐ Full probate administration | ☐ Small estate procedure / affidavit |
| ☐ Spousal property petition | ☐ Ancillary probate (other state) |
| ☐ Trust administration (no probate) | ☐ Appointment as executor |
| ☐ Help with forms, notices & deadlines | ☐ Inventory & appraisal coordination |
| ☐ Sale of real property | ☐ Final accounting & distribution |
| ☐ Will contest or dispute → Part 8 | ☐ Creditor claim against an estate |

Many states offer simplified procedures for smaller estates and for property passing to a surviving spouse, which are faster and less expensive than full probate.

PART 7 — CASE STATUS (IF ALREADY STARTED)

7.1 Has a probate case been filed? ☐ Yes ☐ No

Court / County: _____ Case Number: _____

Date filed: _____ Next hearing: _____

7.2 Status:

- | | |
|--|--|
| ☐ Petition filed | ☐ Letters issued |
| ☐ Bond posted | ☐ Inventory & appraisal filed |
| ☐ Creditor notices sent | ☐ Final accounting stage |
| ☐ Nothing filed yet | |

7.3 Executor / administrator currently serving: _____

7.4 Is another lawyer or firm already handling the estate? ☐ Yes ☐ No

PART 8 — DISPUTES

8.1 Check all that apply:

- ☐ Will contest (undue influence, capacity, forgery)
- ☐ Disagreement among heirs / beneficiaries
- ☐ Executor not communicating or acting
- ☐ Suspected mismanagement or missing assets
- ☐ Accounting dispute
- ☐ Removal of executor / trustee
- ☐ Claim that property was taken before death
- ☐ None

8.2 Describe the dispute: _____



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PART 9 — IMMEDIATE NEEDS

9.1 Check all that apply:

- | | |
|--|--|
| ☐ Paying funeral expenses | ☐ Paying mortgage / utilities |
| ☐ Securing the home or vehicles | ☐ Accessing accounts for expenses |
| ☐ Care of pets | ☐ Keeping a business running |
| ☐ Protecting property from others | ☐ None |

9.2 Anything else we should know: _____

PART 10 — DOCUMENT CHECKLIST

Please provide copies of the following, if available. Check each item you are including.

- | | |
|---|--|
| ☐ Certified death certificates | ☐ Original will / codicils |
| ☐ Trust documents | ☐ Deeds & property tax bills |
| ☐ Bank & investment statements | ☐ Retirement / life insurance beneficiary forms |
| ☐ Vehicle titles | ☐ Bills, creditor letters & claims |
| ☐ Recent tax returns | ☐ Court papers filed so far |

Certification:

I declare that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating this probate matter.

Signed and dated this ____ day of _____, 20__

Signature: _____

Print Name: _____

Please Print and Email to STEVE@STEVEMUELLERLEGAL.COM, or
save this document as a PDF and email to STEVE@STEVEMUELLERLEGAL.COM,
Your information will be reviewed within one hour.