

**CYNTHIA L. BARRETT, P.C.**

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**Probate Information Sheet**

Name and Address of Decedent: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

County in which Decedent Resided: \_\_\_\_\_

Date of Death and Place of Death: \_\_\_\_\_

Birth Date of Decedent: \_\_\_\_\_

Social Security No. of Decedent: \_\_\_\_\_

Name and Address of Pers. Rep.: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Relationship to Deceased: \_\_\_\_\_

Social Security No. of Pers. Rep.: \_\_\_\_\_

Is There A Will:        YES    NO

Approximate Value of the Estate: \$ \_\_\_\_\_ (For Initial Bond)

Name and Address of Decedent's Spouse:

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

Names and Addresses of Decedent's Children:

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

Names and Addresses of Any Devisees Named in Will:

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

List Any Known Creditors:

Creditor:	Amount Owning:
_____	\$ _____
_____	\$ _____
_____	\$ _____

**PROBATE**

The term “probate” generally refers to the court procedure for validating a will and passing ownership of property from a decedent to others. Most states have some form of simplified probate allowing many estates to be probated “informally” with minimal court supervision. **Informal probate can be reduced to the following steps:**

- One of the heirs or the personal representative nominated in the will submits a written probate application.
- If the application is acceptable, the court appoints the personal representative (PR).
- Court or PR publishes notice of probate.
- PR notifies heirs, beneficiaries, and decedent’s creditors of probate.
- Court issues authority for the PR. to act (usually Letters Testamentary or Letters of Administration).
- PR. lists, values, and collects decedent’s property and may sell the decedent’s home or other assets.
- PR. files tax returns and pays tax and other debts of the decedent and estate.
- PR. makes a full accounting to the beneficiaries and distributes the remaining property according to the will or, if none, according to state law.
- PR notifies the court that probate is complete.