

# LAW OFFICES OF JAMES E. MISCAVAGE

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Attorney  
James E. Miscavage

## ESTATE QUESTIONNAIRE

Your Name \_\_\_\_\_

Your Spouse's Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

\_\_\_\_\_

Email Address \_\_\_\_\_

Executor's Social Security Number \_\_\_\_\_

Phone (Home) \_\_\_\_\_ (Work) \_\_\_\_\_ (Cell) \_\_\_\_\_

Name of Decedent \_\_\_\_\_ Relationship to Decedent \_\_\_\_\_

Decedent's Last Address \_\_\_\_\_

\_\_\_\_\_

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

Place of Death \_\_\_\_\_

Decedent's Social Security Number \_\_\_\_\_

1. Did Decedent have a Will? \_\_\_\_\_ A Codicil? \_\_\_\_\_

2. Please list Decedent's heirs and next of kin:

Name	Address	Relationship
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3. Did Decedent have a Safe Deposit Box? \_\_\_\_\_ If so, where? \_\_\_\_\_

4. Did Decedent own real estate in Pennsylvania? If yes, please list address, how titled and approximate fair market value.

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5. Did Decedent own real estate in any other state other than Pennsylvania? If yes, please list address, how titled and approximate market value.

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6. Did Decedent own any vehicles, mobile homes, boats, trailers, etc? If yes, please describe and include make, model, year and how titled.

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7. Did Decedent own any stock or bonds? If yes, please list the following:

TITLE OF STOCK OR BOND	OWNED BY	VALUE
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8. Did Decedent hold closely held stock or was the Decedent involved in any partnerships or sole proprietorships? If yes, please explain.

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9. Please list any and all bank accounts with the Decedent's name.

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10. Did Decedent have any life estates, annuities or term life insurance? If yes, please describe.

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11. Please list all debts of the Decedent.

CREDITOR/DESCRIPTION

BALANCE OWED

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12. Was the Decedent involved in any business either as a sole proprietor, partner or officer of a corporation?

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13. If the Decedent was over the age of 55, please indicate whether the Decedent received any welfare, Medicaid, cash assistance or medical benefits from the state or federal government.

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How did you find the attorney?

Referred by \_\_\_\_\_

\_\_\_\_\_ Verizon Yellow Pages

\_\_\_\_\_ Live in Neighborhood/Saw Sign

\_\_\_\_\_ Local Verizon Yellow Phone Book

\_\_\_\_\_ Internet

\_\_\_\_\_ Yellow Book

\_\_\_\_\_ Saw Ad in \_\_\_\_\_

## DOCUMENTS TO BRING WITH YOU TO ATTORNEY

- Will(s)
- Death Certificate
- Deed(s) to real estate
- Mortgages(s) on real estate
- Credit Card Statements
- Bank and Brokerage account statements
- Insurance Policies
- Car titles
- Last 2 years tax returns