

ESTATE INTERVIEW CHECKLIST

Name of Deceased _____

Place of Death _____

Deceased was a resident of _____

Heirs: Spouse? _____ Children? _____

Brothers or sisters? _____

Any predeceased heirs? _____

If predeceased heirs, children? _____

Any heirs in military service? _____

► Checklist prepared by _____

► Date of Death _____

► Is there a Will? Yes/No (circle one).

If so, please bring original Will.

Parents? _____

Minors or Incompetents? _____

Estate Recovery Program involved? _____

ASSETS ON HAND	DOLLAR VALUE SUBJECT TO ADMINISTRATION	HOW ASSET IS TITLED: JOINTLY OWNED, PAYABLE ON DEATH, TRANSFER ON DEATH, BENEFICIARY, ETC. WITH WHOM
REAL ESTATE Address: _____		
CHECKING ACCOUNTS		
SAVINGS ACCOUNTS		
SAVINGS CERTIFICATES/ CDs		
SAFETY DEPOSIT BOX		
MONEY MARKETS		
STOCKS		
BONDS/MUTUAL FUNDS		
RETIREMENT FUNDS		
LIFE INSURANCE POLICIES		
NOTES OR LOANS		
CARS/TRUCKS/FARM EQUIPMENT		
OTHERS (BOATS, ATV, CAMPERS, ETC.)		
EXPENSIVE JEWELRY/GUNS/TOOLS		
EXPENSIVE COLLECTIONS		
HOUSEHOLD FURNISHINGS		
ANY OTHER ITEMS/ASSETS OF VALUE		

ONCE COMPLETED, PLEASE CALL THE PROBATE OFFICE AT (715) 839-4823 TO DISCUSS WITH THE REGISTER IN PROBATE.