

PROBATE INFORMATION SHEET

WHEN YOU HAVE COMPLETED THIS FORM, please bring it to your next scheduled meeting along with a certified copy of the decedent's death certificate. Please be sure to provide information that is accurate and complete in all respects. If needed, please attach additional sheets.

Full Name of Decedent (deceased person): _____

Street Address, City, State, Zip: _____

County of Residence: _____ **Social Security Number:** _____

Date & Place of Birth: _____

Date & Place of Death: _____

Date of Will: _____ **Date of Codicil:** _____

Separate Writing Found: Yes _____ No _____

Name of Bank Where Safe Deposit Box Was Held: _____

Spouse's Name: _____

Street Address, City, State, Zip: _____

Date & Place of Birth: _____

Date & Place of Death: _____

Social Security Number: _____

Name of Personal Representative: _____

Street Address, City, State, Zip: _____

Social Security Number: _____ **Home Phone No.:** _____

Relationship to Decedent: _____ **Work Phone No.:** _____

Children of Decedent and Spouse:

1. Name: _____ 2. Name: _____

Street Address: _____ Street Address: _____

City, State, Zip: _____ City, State, Zip: _____

Date of Birth: _____ Date of Birth: _____

Social Security No.: _____ Social Security No.: _____
3. Name: _____ 4. Name: _____
Street Address: _____ Street Address: _____
City, State, Zip: _____ City, State, Zip: _____
Date of Birth: _____ Date of Birth: _____
Social Security No.: _____ Social Security No.: _____

List any children of the Decedent who are not also children of the above-named spouse:

1. Name: _____ 2. Name: _____
Street Address: _____ Street Address: _____
City, State, Zip: _____ City, State, Zip: _____
Date of Birth: _____ Date of Birth: _____
Social Security No.: _____ Social Security No.: _____
3. Name: _____ 4. Name: _____
Street Address: _____ Street Address: _____
City, State, Zip: _____ City, State, Zip: _____
Date of Birth: _____ Date of Birth: _____
Social Security No.: _____ Social Security No.: _____

List children of any children who died before the Decedent:

1. Name: _____ 2. Name: _____
Street Address: _____ Street Address: _____
City, State, Zip: _____ City, State, Zip: _____
Date of Birth: _____ Date of Birth: _____
Social Security No.: _____ Social Security No.: _____

Other beneficiaries:

1. Name: _____ 2. Name: _____
Street Address: _____ Street Address: _____
City, State, Zip: _____ City, State, Zip: _____
Date of Birth: _____ Date of Birth: _____
Social Security No.: _____ Social Security No.: _____

1. Name: _____ 2. Name: _____
Street Address: _____ Street Address: _____
City, State, Zip: _____ City, State, Zip: _____
Date of Birth: _____ Date of Birth: _____
Social Security No.: _____ Social Security No.: _____

Homestead Information:

Legal Description: _____

Exact Name(s) on Title: _____
County: _____ Abstract or Torrens: _____
Mortgage Holder: _____ Assessor's Est. Market Value: _____
Amount of Mortgage: _____ Fair Market Value: _____

Additional Real Estate Information:

Legal Description: _____

Exact Name(s) on Title: _____
County: _____ Abstract or Torrens: _____
Mortgage Holder: _____ Assessor's Est. Market Value: _____
Amount of Mortgage: _____ Fair Market Value: _____

Business and Farm Assets:

Name of Business: _____
Street Address, City, State, Zip: _____
Type of Business: _____ Approximate Value of Business: _____
Name of Person Operating Business: _____

If farm property, please provide a list of machinery (with approximate value) livestock, crops, leases, etc.

Cash and Bank Accounts:

1. Name: _____	2. Name: _____
Name of Bank: _____	Name of Bank: _____
Account No.: _____	Account No.: _____
Type of Account: _____	Type of Account: _____
Cash Value: _____	Cash Value: _____
Name of Joint Owner or POD: _____	Name of Joint Owner or POD: _____
3. Name: _____	4. Name: _____
Name of Bank: _____	Name of Bank: _____
Account No.: _____	Account No.: _____
Type of Account: _____	Type of Account: _____
Cash Value: _____	Cash Value: _____
Name of Joint Owner or POD: _____	Name of Joint Owner or POD: _____

Securities, Stocks and Bonds:

1.	Name of Company: _____	
	Type of Investment: _____	Total No. of Shares: _____
	Name of Joint Owner or POD: _____	Value per Share on Date of Death: _____
2.	Name of Company: _____	
	Type of Investment: _____	Total No. of Shares: _____
	Name of Joint Owner or POD: _____	Value per Share on Date of Death: _____
3.	Name of Company: _____	
	Type of Investment: _____	Total No. of Shares: _____
	Name of Joint Owner or POD: _____	Value per Share on Date of Death: _____

Insurance:

1.	Name of Company: _____	
	Value of Policy: _____	Payable to Whom: _____
2.	Name of Company: _____	
	Value of Policy: _____	Payable to Whom: _____

Personal Property:

Auto Make and Model: _____ Value: _____

Joint Owner: _____

Value of Furniture and Household Goods: _____

Value of Wearing Apparel and Jewelry: _____

Value of Other Personal Property: _____

Funeral Expenses:

Name of Funeral Home: _____ Amount Owed to Funeral Home: _____

List anyone who advanced funds for funeral expenses:

Name: _____ Amount Advanced: _____

Name: _____ Amount Advanced: _____

Name: _____ Amount Advanced: _____

Did Decedent receive Medical Assistance benefits? _____

If Decedent's spouse died first, did he/she receive Medical Assistance benefits? _____

Other Debts and Claims:

1. Name: _____ 2. Name: _____

Street Address: _____ Street Address: _____

City, State, Zip: _____ Account No.: _____

Amount of Claim: _____ Amount of Claim: _____

Reason for Claim: _____ Reason for Claim: _____

Taxes:

Date real estate taxes are next due: _____ Amount Due: _____

When did Decedent last file income tax returns? _____

Did Decedent file gift tax returns for gifts made during lifetime? _____

Settling a Probate Estate

It is the duty of the Personal Representative to proceed with the following steps in settling a probate estate. This law office will help you during each step of the process.

1. Prepare and file with the Probate Court in the county of decedent's residence a Petition for Probate of Will along with required accompanying documents. Legal notice by U.S. mail must be given to all beneficiaries named in the Will, and to all heirs-at-law as defined by Minnesota Statutes. The majority of families retain a law firm for representation in the probate proceeding to insure that legal matters are properly dealt with during the proceeding.
2. The nominated Personal Representative attends a Court hearing, if required.
3. Obtain an I.R.S. tax identification number (EIN) for tax reporting purposes of the probate estate. This law office will assist you in preparing the proper form.
4. With a certified copy of the Letters Testamentary, an estate checking account must be opened for deposit of all income into the estate and for payment of all bills. The estate checking account should be entitled:

The Estate of _____, Your Name, Personal Representative

The checks used in an estate account must be returned to you so that you will have your returned check as a receipt for the Probate Court when the estate is closed out.

5. The Inventory and Appraisal of the estate must be prepared setting forth for the heirs and beneficiaries all the assets contained in the estate. The Personal Representative is given six months from the issuance of the Letters Testamentary to file the Inventory with the Court.
6. All checks that need to be deposited should be put into the estate account.
7. Determine all proper debts of the estate and make payment on them, requesting a receipt as each bill is paid.
8. If redeeming mutual funds or stock, it will be necessary to send certified copy of Death Certificate and Letters Testamentary, and have your signature on the letter of instruction guaranteed.
9. After sufficient time has passed and the Personal Representative is comfortable that all debts of the estate have been paid and that all the income the estate can expect has been collected, the Final Account must be prepared.
10. If an estate earns over \$600 of income, or if there is a sale of a house through the estate while the estate is being administered, a 1041 income tax return must be filed.
11. Once the Final Account has been approved by the Court, the Personal Representative is able to divide up the remaining assets in the estate between the heirs and beneficiaries as set forth by law or by the Last Will and Testament of the decedent.
12. Receipts from all heirs are filed with the Court stating that they have received their share, and the Probate estate is then closed out.